Request for Proposals for dcr. the Rehabilitation, Reuse & and Maintenance of:

Open House: Saturday, August 3, 2019, 10am- 1pm Proposals Due: Tuesday, September 17, 2019, by 3pm

Wenhum Swamp

WHITEHEAD

HOUSE

DALE STATE



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

Contact Us: Department of Conservation and Recreation 251 Causeway Street, Suite 600 Boston, MA 02114-2104

DCR Main Phone: 617-626-1250 e-mail: <u>mass.parks@state.ma.us</u>

Commonwealth of Massachusetts Charles D. Baker, *Governor*

Executive Office of Energy & Environmental Affairs Kathleen Theoharides, *Secretary*

Department of Conservation & Recreation Leo P. Roy, *Commissioner*

Priscilla Geigis, Deputy Commissioner for Conservation and Resource Stewardship Nicholas Gove, Deputy Commissioner for Recreation and Operations

Bureau of Planning, Design and Resource Protection Patrice Kish, *Chief*

Office of Cultural Resources Wendy Pearl, Acting Director

Historic Curatorship Program Kevin Allen, Program Manager Peter Seweryn, Project Manager

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PART I – OVERVIEW: FORGING A UNIQUE PARTNERSHIP

The Commonwealth of Massachusetts, acting by and through the Department of Conservation and Recreation (DCR) is pleased to invite Proposals for a unique opportunity:

The rehabilitation, reuse and maintenance of the historic Whitehead House at Willowdale State Forest in Ipswich in return for a long term lease

A. Historic Curatorship Program Basics

Within the Commonwealth's over 450,000 acre park system are a number of unused, historically significant buildings. Some of these properties have declined due to neglect, exposure to



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

natural elements and vandalism. In an effort to preserve these properties, the Historic Curatorship Program was established. 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, the Commonwealth secures the longterm preservation of a threatened historic structure and the Curator exchanges hard work and unique skills for the opportunity to live or work in a one-of-a-kind location.

A Curator is selected through an open and competitive process, and a proposed reuse must be compatible with the historic and natural character of the surrounding parkland. 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. Lease terms generally range from 25 to 40 years and are determined based on the amount of work required and the Fair Market Rent.



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

B. Purpose of Request for Proposals (RFP)

The purpose of this RFP is to identify and select a Curator who:

- Is committed to the rehabilitation, management and maintenance of the historic Whitehead House
- Understands and accepts the unique challenge of leasing a property located in a state park
- Possesses the required skills and resources to ensure the long term preservation of the property

The State Legislature enacted enabling legislation for the Historic Curatorship leasing program in 1994 (§44, Ch.85, Acts of 1994 as amended, see Appendix F). This legislation provides for an open, competitive selection process for Curators, consistent with established procedures of the Massachusetts Division of Capital Asset Management and Maintenance (DCAMM). This Request for Proposals conforms to these requirements.

PROPOSALS MUST BE RECEIVED BY THE DEPARTMENT OF CONSERVATION AND RECREATION AT THE ADDRESS SPECIFIED IN THIS RFP NO LATER THAN **3 PM, Tuesday, September 17, 2019.** REFER TO PART IV OF THIS RFP FOR PROPOSAL SUBMISSION REQUIREMENTS

An Open House to view and inspect the property is tentatively scheduled for **Saturday, August 3, 10am- 1pm** Please RSVP for the Open House to the below contact if you plan to attend.

riease issue for the open house to the below contact if you plan to attend.

For any questions on this RFP, contact the Historic Curatorship Program:

Kevin Allen, Program Manager 251 Causeway St., 7th Floor Boston, MA 02114-2104 <u>HCP.Requests@state.ma.us</u> 617-626-1361 tinyurl.com/ma-curators

PART II - PROPERTY INFORMATION

A. Site Context

The Whitehead House is located on Massachusetts's North Shore, at 290 Linebrook Street in the Ipswich section of Willowdale State Forest. The house is set in a residential neighborhood a mile from Route 1 and is less than five miles from Ipswich town center. Ipswich is a desirable location, 45 minutes from Boston, and close to beaches, rivers, parks and historic village centers.





B. Building Description

The Whitehead House is a two story hall-and-parlor house with a one-story rear kitchen addition. The house served as a park employee housing through the second half of the twentieth century, but has been uninhabited for approximately twenty years.

- Square footage: Approximately 1400 sq. ft.
- Two bedrooms, 1 bath, living room, kitchen, living room and dining room. (Extra room on second story could be converted into a second bath)
- Water: Municipal water. Location of service connection unknown; may need to be replaced.
- Septic system: Failed. Percolation tests and design plans were produced for the property in 2011. These plans and associated test pits will likely need to be upgraded to be approved by the MA Department of Environmental Protection for in order to construct the system.
- Heat: Forced hot air, gas fired furnace: Fair to poor condition, may need to be replaced.
- Electric: Poor condition.
- Structural: The main section of the house is in fair condition; the rear addition will required some level of structural repair.
- Interior: Plaster walls, wood floors, interior trim in fair to good condition; many areas of the ceilings will require repair / replacement. The house is not insulated.
- Exterior: Fair condition. Some repair / replacement / repainting of clapboards and trim boards, and repair of window sash and frames will be required. Roof is in good condition but will require replacement in 5-10 years.
- Hazardous materials: A comprehensive hazardous materials report was prepared in 2018 (available upon request).

C. Photographs













D. Historic Significance

The Whitehead House (c. 1840) retains its original exterior finish and is noteworthy for its simple, well proportioned Greek Revival form with characteristic sidelights and transom surrounding the front door. It was purchased by Bradley Palmer from the Small family in the early 20th century and became part of his large country estate. The property is not currently listed in the National Register of Historic Places, but is eligible for listing as a contributing resource in a potential Willowdale State Forest Historic District.

E. Property Access & Adjacent Land Use

The site is in the northern boundary of the Forest and is separated from the Forest proper by a right of way held by the Town of Ipswich. Private parcels border the parcel to the west and across Linebrook Road. The house is located in a low density residential neighborhood.

F. Development Considerations

- The property is in very poor condition and will be offered in an as is condition. A potential Curator will be required to provide all improvements needed to receive a Certificate of Occupancy while preserving significant exterior and interior features.
- In a previous solicitation for this property in 2011, DCR contracted with an engineering consultant to prepare percolation tests and design drawings for a new residential Title V septic system. These plans will most likely need to be re-submitted by a future Curator to the Department of Environmental Protection (DEP) for approval before installing a new system. (septic systems on state property are regulated by DEP and not the local Board of Health).
- The property could be rehabilitated for residential or for nonresidential purposes. Non-residential public uses will require compliance with all applicable building codes as well as the Americans with Disabilities Act.

PART III – CURATORSHIP REQUIREMENTS

A. Reuse Conditions

The Commonwealth considers leasing historic properties through the Historic Curatorship Program primarily as a means to facilitate their long term preservation. Historic properties may be leased only if the following reuse conditions are met:

1. The proposed use(s) are compatible with the mission of the Department of Conservation and Recreation;

2. The proposed use(s) are compatible with the public's enjoyment of the surrounding park;

3. The proposed improvements and use of the property are compatible with the quality and significance of the resource;

4. The proposal for reuse includes public access to the property at least twice annually.

B. Responsibilities

The Commonwealth intends that, under the lease, the Curator, and all heirs, successors and assigns, shall have sole responsibility for:

1. Rehabilitating and maintaining the property as a significant historic resource in conformance with the preservation and construction standards outlined in Appendix D and in The Secretary of the Interior's Standards for the Treatment of Historic Properties (1992); and taking all practicable precautions against damage by fire, vandalism or other cause.

2. Occupying and maintaining the property in conformance with the Lease and any other conveyancing or contractual instruments, and all applicable permits, federal, state and local laws, regulations and the like.

3. Defraying any and all costs (above DCR's agreed upon level of assistance if any) associated with the capital improvement and repairs and maintenance of the property in conformance with the Lease and any other conveyancing or contractual instruments.

4. Paying all applicable local and state taxes or fees which may be associated with the property for the duration of the lease.

5. Maintaining in full force sufficient insurance to cover costs of rehabilitating any partial damage or destruction of the property, including flood coverage for any part of the lease area that falls within a delineated flood zone.

6. Maintaining comprehensive liability insurance for all activities.

7. Indemnifying the Commonwealth against all claims or suits brought as a result of an error or an act or omission by the Curator.

8. Ensuring that the proposed improvements are carried out by person(s) with sufficient qualifications and/or appropriate licensure

C. Required Improvements

The selected Curator will be responsible for all improvements required to rehabilitate the property to the Secretary of the Interior's Standards for Historic Rehabilitation (see Appendix D). The core ideal of these standards is to repair original materials, and if absolutely necessary, replace missing elements "in kind" with similar materials and design. Minimum expected improvements are outlined in Exhibit B, and include:

- Repair or replacement of all systems and fixtures (septic, heating, plumbing, electrical, etc)
- Rehabilitation of all doors and windows
- Repair of structurally unsound framing
- Rehabilitation of all exterior trim and siding

These improvements and any others proposed by the Curator will be outlined in a Work Plan that will be incorporated into the lease. These identified improvements assume a single family residential reuse of the property. Any other proposed reuse may require additional improvements to meet building code and accessibility requirements.

The estimated cost of the baseline Required Improvements is **\$483,068**. Please keep in mind that the cost estimates represent the value of the work if DCR was to hire contractors to perform all work. Most Curators are able to leverage sweat equity towards a good deal of the required work. More detailed estimates are included in Appendix B.

D. Maintenance / Management

The Curator will be responsible for all costs related to the reuse and management of the property, including, but not limited to, insurance, utilities, regular and routine maintenance (see Exhibit E for Maintenance Standards and Guidelines).

E. Lease Term

Based on the fair market rent and the value of anticipated work, DCR can offer a **30 year** lease term with two mutually agreeable 5-year extension terms. Alternate proposed lease terms may be considered if supported by sufficient justification.

F. Fair Market Rent

According to the Historic Curatorship Program's Enabling Legislation, DCR must establish a Fair Market Rent (FMR) for the property. For the purposes of this solicitation, DCR is establishing the following rent values based on the FMR values established by the Federal Department of Housing and Urban Development (HUD) for Ipswich (2018). The FMR for any extension terms will be adjusted according to future changes in the Consumer Price Index and/or the HUD FMR values.

U.S. Department of Housing and Urban Development: FY 2018 FMR-2 Bedroom - Ipswich, MA	
Monthly	\$1,740
Annual	\$20,880

G. Fulfillment of Rent Obligation

If all rehabilitation, management and maintenance services agreed upon in the lease are performed, no cash rent will be exchanged. In addition to the value of the rehabilitation investment included in the final lease, the Fair Market Rent is also offset by the value of the following:

1. Management and Maintenance Credit

Curators are credited 15% of the value of the Fair Market Rent annually for the ongoing maintenance of the property (assuming all required maintenance tasks are being performed according to the standards and guidelines established in Appendix E). To recognize the value of the management and occupation of the property (utilities, insurance, fees, any applicable taxes, etc.), the Curator is credited an additional 15% of the value of the Fair Market Rent annually.

Projected Curator Investment vs. Fair Market Rent

Estimated Rehabilitation Costs	\$483,068
Maintenance Credit (15% of the annual FMR) x 30 year lease	\$93,960
Management Credit (15% of the annual FMR) x 30 year lease	\$93,960
Anticipated Curator Investment over the lease term	\$670,988
Total Fair Market Rent, 30 year lease term	\$626,400
Credits approved above the value of the FDM can be applied to potential outs	ncion torma

Credits accrued above the value of the FRM can be applied to potential extension terms

2. Mandatory Improvements

The value of work performed on Mandatory Improvements can be accrued and applied towards the Fair Market Rent for the base term and any proposed extension terms. *Mandatory Improvements* are unexpected tasks that were not identified in Appendices B and C or the Proposal, but are necessary for the continued preservation and occupancy of the property. These improvements are normally capital in nature, and do not include general maintenance (spot repairs, garden maintenance, touch up painting, etc.). General maintenance work is accounted for through the 15% maintenance credit.

For example: Repair begins on interior wall and a rotted corner post is discovered. Since this is a Mandatory Improvement not included in the original assessment, the Curator submits a cost for the repair (materials and labor), and that value can be applied towards the Fair Market Rent for the base term and any extensions.

If a Curator decides to perform *Optional Improvements*, the cost of those improvements cannot be credited towards the Fair Market Rent. Optional Improvements are those projects that are not required for the continued preservation, management or maintenance of the property (for example, a jetted tub or premium appliances)

H. Public Benefit

The Historic Curatorship's Enabling Legislation requires that the property be accessible to the public at least twice a year. The quality and scope of the proposed public benefit beyond this basic requirement is a factor in the evaluation of Curator proposals. DCR encourages Curators to coordinate public benefit activities with other park events. Public uses of the property may be limited by code requirements for occupancy. Public benefit examples:

- Maintaining trails in and around the property
- Maintaining a web site or blog to document the project
- Coordinating a senior's garden and farm tour
- Sponsoring bi-annual tours of the property
- Partnering with the park on an event or project (Great Park Pursuit, Park Serve Day, etc)
- Opening a garden to a local youth group as a service project
- Holding a demonstration class highlighting preservation carpentry
- Allowing a local group to use the property for meeting/event space
- Participate in community-wide events or programs

I. Review and Inspection

1. Review by Massachusetts Historical Commission

As required by Massachusetts General Laws Chapter 9, §26-27c, as amended by Chapter 254, Acts of 1988, and state regulation (950 CMR 71.00), DCR is required to consult with the Massachusetts Historical Commission (MHC) regarding the proposed rehabilitation of the property. The successful culmination of the MHC consultation process will be a finding by MHC that any work plan associated with a lease has "no adverse effect" on the historic qualities of the property. Following provisional designation, the Curator will submit any proposed alterations to DCR, where the work will be reviewed and forwarded to MHC for review and comment via a Project Notification Form (PNF). MHC has thirty days from the submission of a new project notification to review and comment.

2. Inspections and Compliance

DCR reserves the right to inspect any and all work performed under the Curatorship. The State Building and Plumbing Inspectors must review and approve all work to the building and the plumbing, while electrical work, health, fire and safety issues and fire protection fall under the jurisdiction of the local inspectional authority. If applicable, sewer connections or septic system installation / maintenance are regulated by the MA Department of Environmental Protection. The Curator is also responsible for all compliance with any and all state, local or federal regulations, including but not limited to the Natural Heritage and Endangered Species Program and the Wetlands Protection Act.

3. MEPA Review

In accordance with the Massachusetts Environmental Policy Act (301 CMR §11.27), the Curator will be required to work with DCR in filing an Environmental Notification Form (ENF) if the proposed project triggers any of the thresholds for review (see http://www.mass.gov/eea/agencies/mepa/about-mepa/statute-and-regulations/mepa-regulations.html). After the lease is executed, any new major projects not included in the original scope may also require the Curator to file a "Notice of Project Change" with the appropriate MEPA Unit for review. It is not likely that any proposed reuse of the property would trigger MEPA review.

PART IV – PROPOSAL EVALUATION & SELECTION PROCEDURE

A. Evaluation Team

DCR will convene an Evaluation Team composing of staff and other individuals whose interest or expertise qualifies them to provide advice to the Commissioner. This Evaluation Team will review all proposals and make appropriate recommendations to the Commissioner. All information submitted to the Department will remain confidential throughout the evaluation process.

B. Criteria for Evaluation

The following criteria will be used in evaluating all proposals:

Section 1. PROPOSED REUSE (20 total points)

a. Provides for long term preservation of the property (1-5 points)

b. Compatible with DCR's mission to conserve the cultural, natural and recreational resources of the Commonwealth (1-5 points)

c. Compatible with DCR's management of the park (1-5 points)

d. Compatible with needs of park users and friends groups, abutting neighbors and the surrounding municipality (1-5 points)

Section 2. EXPERIENCE AND QUALIFICATIONS (20 total points)

a. Specialized skills in historic preservation (1-10 points)

b. Experience and qualifications to undertake, implement and manage the rehabilitation, reuse and maintenance of the property (1-5 points)

c. Examples of pertinent previous work (1-5 points)

Section 3. REHABILITATION / MAINTENANCE / MANAGEMENT PLAN (20 total points)

a. Quality and feasibility of rehabilitation plan (1-10 points)

- b. Feasibility and efficiency of proposed timeline for rehabilitation tasks (1-5 points)
- c. Quality of Maintenance and Management plan (1-5 points)

Section 4. FINANCIAL CAPABILTY (20 total points)

a. Sources and methods of funding for the rehabilitation of the property (1-10 points)b. Sources and methods of funding for continued upkeep and maintenance throughout the proposed lease term (1-10 points)

Section 5. PUBLIC BENEFIT (15 total points)

- a. Strength of public benefit component beyond twice annual public access (1-10 points)
- b. Feasibility of long term continuation of proposed public benefit component (1-5 points)

PROPOSAL PRESENTATION AND ORGANIZATION (5 total points) Quality and clarity of proposal (1-5 points)

C. Curator Selection Process / Timeline

Following the deadline for responses to this RFP, the Curator selection process will be completed in approximately 8-10 weeks. Please note that the schedule provided is an estimate based on past solicitations and may vary. The process will include:

1. Selection Committee selects one or more finalists to meet for an in-person interview with the Committee **(approx. 2-3 weeks following submission deadline**). Proposers selected for an interview will be required to provide a detailed work plan and annual schedule that addresses all items listed in Appendix B.

2. Selection Committee recommends a selected finalist to the Commissioner **(approx. 2-3 weeks following interviews)**. DCR reserves the right to request further information from a Proposer prior to final selection. DCR reserves the right to waive any formalities.

3. Commissioner reviews Selection Committee recommendation (approx. 3-4 weeks following recommendation) and if accepted, provisionally designates a Curator for the property.

All Proposers will be notified in writing of this Curator designation. Following designation, the Curator and the Commonwealth will sign a Provisional Lessee Designation Agreement which is valid for one year. This agreement requires the designated Curator to provide certain assurances, including proof of insurance and financial capability, before a lease can be executed. During this period, DCR will begin drafting a lease. A lease may be executed any time before the Provisional Lease period if all requirements are fulfilled.

PART V: RESERVATIONS AND CONDITIONS

A. General Reservations

1. DCR makes no express or implied representations or warranties as to the accuracy and/or completeness of any of the information provided as part of this Request for Proposals (the "RFP'), including information that is available upon request. This information is provided subject to errors, omissions, change of cost, lease or conditions, additional changes in and different interpretations of laws and regulations, prior sale, lease or financing.

2. DCR reserves the right to suspend, withdraw or amend this RFP at any time, without notice.

3. DCR reserves the right to seek additional information or revised proposals from respondents or finalists at any time prior to selection of developers through written notice to all respondents.

4. DCR reserves the right to change the selection process or schedule with written notice to all respondents to the RFP or finalists, as necessary.

5. DCR reserves the right to reject, in its sole discretion, any proposal not submitted in conformance with this RFP and any amendments hereto, or to reject any and all proposals, in its sole discretion, for any reason. DCR further reserves the right to waive or decline to waive irregularities in any proposal when it determines that it is in DCR's best interest to do so.

6. If a lease is not executed with the Selected Curator, DCR may choose to execute a Lease with an alternate Curator from the pool of respondents, to terminate the selection process, or to begin a new selection process.

7. DCR reserves the right to discontinue its selection of any Proposer, or the entire RFP process for any reason whatsoever or for no reason, prior to the execution of a Lease.

B. Conflict of Interest and Collusion

1. By submitting a proposal, a Respondent certifies that no relationship exists between the Respondent or any of its officers, employees, agents, or representatives and DCR, or any officer, employee, or agent of DCR that constitutes unfair competition or conflict of interest or that may be adverse to DCR.

2. By submitting a proposal, a Respondent certifies that it has not acted in collusion with any other Respondent or other entity doing business with DCR in a way that would constitute unfair competition.

C. Confidentiality

1. Respondents should assume that all material submitted in response to the RFP will be open to the public following the evaluation process, with the exception of the Respondents' personal financial information which DCR shall endeavor to keep confidential.

2. DCR reserves the right to share any and all ideas from any of the proposals submitted with a selected Curator. No Respondent has proprietary rights to any ideas or materials submitted in its response to the RFP. All material submitted becomes the sole property of DCR.

D. Respondent's Responsibilities

Respondents shall be entirely responsible for verifying construction cost estimates, code requirements, design guidelines, and any other regulatory information. Respondents shall be entirely responsible for verifying any and all site conditions of the property. Copies and summaries of this information are included in this RFP only as a convenience and DCR is not liable for any mistakes, damages, or other consequences arising from use of this information.

E. Other Legal Issues

1. Conflict of Interest

a. DCR employees are not eligible to participate in the Historic Curatorship Program.

b. Employees of the Commonwealth may participate in the Historic Curatorship Program, provided, however, that they comply with the requirements of Chapter 268A §7.

2. Miscellaneous Provisions

The Department's objective in seeking an outside entity to lease the property is the preservation of the property. For this reason, in the event that the property's historic integrity is significantly destroyed by fire or other cause, DCR reserves the right to terminate the lease, unless the Curator is interested in using insurance proceeds to rebuild a similar compatible structure. Additionally, in the event of a default by a Curator, DCR reserves the right to terminate the lease. Events of default may include, but are not limited to, the following: 1) failure to comply with the terms and conditions of the lease agreement; 2) abandonment of the premises; 3) Curator bankruptcy.

DUE DATE: before 3:00pm, Tuesday, September 17, 2019

An Open House to view and inspect the property is tentatively scheduled for **Saturday, August 3, 2019, 10am- 1pm** Please RSVP for the Open House to the below contact if you plan to attend.

A. Format

Five (5) copies (one unbound or in PDF format) of the Proposal must be enclosed in a sealed envelope and submitted to DCR before the time stated in this Request. The face of the envelope containing the Proposal must show, in the upper left corner, the name and address of the Proposer. The face of the envelope must also show, in the lower right corner, the following:

HISTORIC CURATORSHIP PROPOSAL Whitehead House

Proposals should be submitted to the following address, to be received no later than the submittal date specified in the cover letter of this RFP package:

Department of Conservation and Recreation Office of Cultural Resources 251 Causeway Street, 7th floor Boston, Massachusetts 02114-2104 Attn: Kevin Allen, Historic Curatorship Program Manager

Mailed proposals must actually be received, not just post marked, by the submission deadline. Facsimile ("fax") proposals and proposals submitted after the deadline will not be accepted. Proposers are requested to examine this RFP and the accompanying Table of Contents to make sure that all pages are included. DCR assumes no responsibility for a proposal submitted on the basis of an incomplete RFP package.

Proposers are expected to review all requirements and instructions of this RFP; failure to do so will be at the Proposer's risk. Each Proposer should furnish all the information required by this RFP. DCR reserves the right to waive formalities in any Proposal, and may, if it determines that such action is in the best interests of the Commonwealth, select a Proposal which does not conform in all details with the requirements of this RFP. Likewise, the Commonwealth reserves the right to reject any and all Proposals.

This Request does not commit the Commonwealth of Massachusetts to enter into any disposition of real property interest; or to pay any costs, including costs associated with any studies or designs, incurred by any party in the preparation and submission of a Proposal.

Proposals will not be returned but will be retained by DCR for the official record.

ADD ADDITIONAL SHEETS IF NECESSARY

B. Inquiries and Explanations

All inquiries concerning this Request For Proposals should be directed to:

Kevin Allen, Program Manager Historic Curatorship Program Department of Conservation and Recreation 7th floor, 251 Causeway St. Boston, Massachusetts 02114-2104 HCP.Requests@state.ma.us

Tel.: (617) 626-1361

Any explanation desired by a Proposer regarding the meaning or interpretation of this Request must be submitted in writing and with sufficient time allowed for a reply to reach the Proposer prior to the submission of their Proposal. Verbal explanations or instructions shall not be binding on the Department.

Any information given in writing to a prospective Proposer will be furnished to all prospective proposers as an amendment to the Request For Proposals if such information is deemed by DCR to be necessary to Proposers in their preparation and submission of Proposals, or prejudicial to uninformed Proposers if they were to lack such information.

C. Proposal

Proposals should follow the outline and supply all of the information described below, and should demonstrate the ability of the potential Curator to undertake a challenging and complex commitment. It is intended that the substance of a Proposal, as approved by the Commonwealth, will be incorporated into all agreements and real property transactions which may result from the process. Please submit a cover letter with any proposal.

Proposals must include responses to all applicable sections of this RFP. Proposers may fill in the provided spaces and attach additional sheets or submit a separate document containing responses to each of the twelve sections. If the Proposer chooses the latter option, please provide responses in a similar format, under the same section headings. Electronic (Word) versions of the application section are available upon request.

Applicant Information

List the names, addresses and telephone numbers of all principals, partners and others participating in the project.

Name		
Address		
City	State	Zip
e-mail	Telephone	
Name		
Address		
City	State	Zip
e-mail	Telephone	
Name		
Address		
City	State	Zip
e-mail	Telephone	

Section 1: Proposed Reuse (20 points)

Please provide a narrative summary of the Proposed Reuse concept. Be sure to describe how the proposed reuse concept meets the following criteria:

a. Provides for long term preservation of the property (5 points)

b. Compatible with DCR's mission to conserve the cultural, natural and recreational resources of the Commonwealth (5 points)

c. Compatible with DCR's management of the park (5 points)

-Would the proposed reuse present additional burdens to DCR in terms of significantly increased cost or staff time?

d. Compatible with needs of park users and friends groups, abutting neighbors and the surrounding municipality (5 points)

-Response to this section may be accompanied by letters of support

Section 2: Experience and Qualifications (20 points)

Provide a narrative summary of experience and qualifications to undertake, implement and manage the rehabilitation, reuse and maintenance of the property. Supplemental material describing pertinent projects, including visual aids, is encouraged but not required. Specifically address the following criteria:

a. Specialized skills in historic preservation (10 points)

-Including possession of any certifications and licenses in trades and skills pertinent to the rehabilitation

b. Experience and qualifications to undertake, implement and manage the rehabilitation, reuse and maintenance of the property (5 points)

- Including but not limited to business management skills, project management skills, experience in non-profit development / management)

c. Examples of pertinent previous work (5 points)

Section 3: Rehabilitation / Maintenance / Management Plan (20 points)

Curators are responsible for the **rehabilitation**, **maintenance** and **management** of the historic property. This section should outline the proposed plan to address all three responsibilities.

a. Rehabilitation Plan Summary (10 points)

This section should specify how the Proposer intends to carry out the Rehabilitation phase of the project, including the Required Improvements listed in Appendix B. Please use this section to propose eliminating, adding, or changing any Required Improvements and provide justification.

1. Narrative statement describing rehabilitation plan in general.

2. Rehabilitation Pro forma

These priority tasks are derived from the Conditions Assessment Report (Appendix B). Costs reflect markups as described in the report, including allowances for permits, engineering and architectural design fees, etc. Please keep these costs in mind when estimating, as some construction permits may require professional design services. This list represents the priority rehabilitation tasks; however the proposal may add or remove items from this list based on the proposed reuse and rehab plan. A finalized work plan will be incorporated into the lease.

Please keep in mind that the cost estimates represent the value of the work if DCR was to hire contractors to perform all work. Most Curators are able to leverage sweat equity towards a good deal of the required work. Please indicate proposed actual costs for these tasks. The DCR estimated value will be the amount credited towards the fair market rent, since it represents the true value of the work to the agency. The estimates provided do not include unforeseen capital improvements in the future that are also the responsibility of the Curator.

*Note: Some cost estimates vary from those provided in the original Conditions Assessment due to updated comparable projects. These cost estimates take precedent over those provided in the Conditions Assessment

			Proposed	To be
Category	Task Description	DCR ESTIMATE	Estimated	Completed
	Task Description	DERESTIMATE	0031	in real.
GENERAL	Test & Inspect electrical	4005.00		
REQUIREMENTS	system	\$835.82		
	Remediate basement			
	dampness with dehumidifiers	\$753.61		
	Remove or prune overgrown			
SITE WORK	vegetation	\$1,507.22		
	Dead limb trees	\$1,507.22		
	Remove furnishings,			
	carpeting, household items			
	and debris	\$753.61		
	Remove plaster debris	\$678.25		
	New layer of gravel or stone			
	dust on driveway	\$1,588.06		
	Install perimeter French drain	\$12,537.29		
	Regrade around perimeter of			
	house	\$4,179.10		
	Install crushed stone drip			
	edge	\$2 <i>,</i> 089.55		
CONCRETE	Fill slab cracks at entry slab	\$1,253.73		
	Inspect and clean chimney			
MASONRY	flues, fireboxes and cleanouts	\$2,674.62		
WOOD AND	Expose hidden framing for			
PLASTICS	assessment and repair	\$417.91		

	Repair deteriorated		
	clapboards in kind	\$13,373.11	
	Repair damaged cornice		
	moulding in kind	\$7,522.37	
	Repair deteriorated		
	cornerboards in kind	\$7,112.82	
	Replace missing porch post.		
	Provide metal post bases	\$3,259.70	
	Secure loose treads, prep		
	stairs for finish and paint	\$3 <i>,</i> 543.87	
	Repair damaged pilaster		
	surrounds	\$6,352.23	
	Minor carpentry repairs to		
	wood floors	\$3,343.28	
	Remove deteriorated wood		
	at hearth, provide new		
	beams	\$5 <i>,</i> 850.74	
	Sister LVL beam to main		
	beam next to basement stair	\$2,674.62	
	Sister LVL beams to beams		
	with insect damage	\$5 <i>,</i> 349.24	
	Replace plywood sheathing	44 500 00	
	with board sheathing	\$1,588.06	
	Replace rotted section of sill		
	under main entrance	\$6,686.56	
	Chimney can	င်စာရော	
ROOFING	Chimney cap	\$835.82	
	flashing	¢E 11E 21	
	Roplace aluminum flashing	\$5,115.21	
	with new conner flashing	\$7 020 88	
	Benein deterioreted bulkhood	\$7,020.88	
	door	¢1 252 72	
WINDOWS	Bonair wood window sills	\$1,233.73	
	Repair wood window sills	\$6,556.19	
	sashes paint	\$25.074.58	
	Bonair cido door naint	\$23,074.38	
	Ropair main door	\$2,003.97	
		ې2,507.40 د محمد م	
	linetall historia starm / sorean	\$376.8U	
		¢E 600 E7	
	Clean and paint / refinich	/ د.دەט, دې	
	interior paint of floors	\$8 770 /F	
FINISTES		۶٥,//۶.45	

	Remove loose flaking plaster		
	in bedroom. Patch and skim		
	coat for finish. Paint.	\$4,179.10	
	Remove loose flaking paint,		
	repair plaster, prep for new		
	finish and paint	\$10,447.74	
	Remove loose flaking		
	wallpaper, repair plaster,		
	prep for new finish and paint	\$16,298.48	
	Remove gypsum wall board		
	and replace plaster to match		
	adjacent rooms.	\$8,358.19	
	Remove living room ceiling		
	tiles	\$5,275.25	
	Prep and paint existing wood		
	work	\$12,119.38	
	Remove tile flooring and		
	install new wood, cork or tile		
	flooring	\$11,701.47	
	Prep and paint exterior of		
	house	\$16,716.39	
MECHANICAL	Design / Install septic system	\$41,790.97	
	Remove and replace		
	plumbing system	\$35,104.42	
	New hot water tank	\$2,507.46	
	Remove and replace tub,		
	toilets and sinks	\$6,686.56	
	Remove and replace heating		
	system	\$66 <i>,</i> 865.55	
	Provide second story		
	bathroom	\$25 <i>,</i> 074.58	
	Remove surface mounted		
ELECTRICAL	electrical conduit and outlets	\$334.33	
	Remove and replace electrical		
	system	\$41,790.97	
	Provide new 200 amp service	\$5,014.92	
	Provide all new electrical		
	fixtures	\$8,358.19	
		\$483,068.18	

b. Rehabilitation Schedule (5 points)

1. Narrative statement on proposed rehabilitation schedule

2. Rehabilitation Schedule Template

Please include a general schedule with milestones for all of the improvements listed above, grouped by the year work will occur. A more detailed schedule will be required before lease execution. Use the format below or another that clearly indicates expected annual rehabilitation costs.

Schedule should prioritize tasks which will:

- Facilitate occupancy as soon as possible
- Address immediate threats to the property or pose safety hazards
- Improve the exterior / public view of the property

Task		Proposed cost
2019	Month / month range	
Task 1	Jan-March	\$
Task 2	Jan-March	\$
Task 3	Jan-March	\$
Task 4	March-April	\$
Task 5	May-August	\$
Task 6	August-November	\$
Annual Rehabilitation Subtotal		\$
2020		
Task 7	Jan-Mar	\$
Task 8	Jan-Mar	\$
Task 9	Jan-Mar	\$
Task 10	Mar-Apr	\$
Task 11	May-Aug	\$
Task 12	Aug-Nov	\$
Task 13	Oct-Dec	\$
OCCUPY PROPERTY	Dec.	
Annual Rehabilitation Subtotal		\$
2021		
Task 14	Jan-Mar	\$
Task 15	Jan-Mar	\$
Task 16	Jan-Mar	\$
Task 17	Mar-Apr	\$
Task 18	May-Aug	\$
Annual Rehabilitation Subtotal		\$
2022		
Task 21	Jan-Mar	\$
Task 22	Jan-Mar	\$
Task 23	Jan-Mar	\$
Task 24	Mar-Apr	\$
Annual Rehabilitation Subtotal		\$
ADD ADDITIONAL YEARS IF NECESSARY		

c. Maintenance + Management (5 points)

Use this section to identify anticipated costs related to ongoing maintenance and management of the property. Maintenance costs including mowing, roof repairs, repointing, mold remediation, pest control, maintaining mechanical systems, etc.

Management costs include those related to the operation and occupancy of the property, including insurance, utilities, applicable fees and taxes, etc.

1. Narrative Statement regarding estimated maintenance and management tasks

2. Estimated Management and Maintenance Costs

Use this table or another format to estimate annual costs for the maintenance and management of the property. The cost estimates for maintenance should consider average costs in a given year, and anticipate unforeseen major repairs that may have to be done over the term of the lease (roof replacement, repainting, etc).

Annual Maintenance Estimate	\$
Annual Management Estimate	
Insurance	\$
Utilities	\$
Fees / taxes	\$
other costs	\$
Annual Management Estimate-TOTAL	\$

d. Lease Term

Use this section to describe an alternative term, if applicable, to the offered 30 years with 2mutually agreeable 5-year terms. Include justification for the proposed term by describing any additional proposed investment or services. DCR reserves the right to accept or refuse any alternate lease term as part of the evaluation and selection process.

Section 4: Financial Capability (20 points)

This section is used to determine the proposer's financial prospects for implementing the requirements of this RFP. All information will remain *confidential*. In this section provide information that addresses the projected sources of income for the rehabilitation phase of the project, as well as the ongoing maintenance and management expenses throughout the term of the lease.

Financial plan must include specific sources and amounts
Plan must not rely heavily on volunteer labor or anticipated grants and fundraising without written commitment
Plan should include information about in-hand funds

-plan for non-residential uses should be based on market research and precedent

a. Sources and methods of funding for the rehabilitation of the property (10 points)

Provide a brief narrative statement of the overall financial plan:

b. Sources and methods of funding for continued upkeep and maintenance throughout the proposed lease term (10 points)

Provide a brief narrative statement of the overall financial plan:
c. Supporting Data

Anticipated Income Pro Forma

Use the table below to compare estimated income with expected costs (from previous sections)

(attach more detailed breakdowns if desired. If this proposal is selected as a finalist, Proposer may be required to provide more detailed projected cost and income information).

2019		
Income source	Estimated income]
Source 1	\$	
Source 2	\$	
Source 3	\$	
TOTAL 2019 Income		\$
Annual Rehab Subtotal	\$	
Annual Estimated Maintenance costs	\$	
Annual Estimated Management costs	\$	
Total 2019 costs		\$

2020			
Income source	Estimated income		
Source 1	\$		
Source 2	\$		
Source 3	\$		
TOTAL 2020 Income		\$	
Annual Rehab Subtotal	\$		
Annual Estimated Maintenance costs	\$		
Annual Estimated Management costs	\$		
Total 2020 costs		\$	

2021		_
Income source	Estimated income	
Source 1	\$	
Source 2	\$	
Source 3	\$	
TOTAL 2021 Income		\$
Annual Rehab Subtotal	\$	
Annual Estimated Maintenance costs	\$	
Annual Estimated Management costs	\$	
Total 2021 costs		\$

2022		
Income source	Estimated income	
Source 1	\$	
Source 2	\$	
Source 3	\$	
TOTAL 2022 Income		\$
Annual Rehab Subtotal	\$	
Annual Estimated Maintenance costs	\$	
Annual Estimated Management costs	\$	
Total 2022 costs		\$

For all remaining lease years following completion of major rehabilitation (anticipated average per year)		
Income source	Estimated income	
Source 1	\$	
Source 2	\$	
Source 3		
	\$	
TOTAL anticipated annual Income		\$
Annual Estimated Maintenance costs	\$	
Annual Estimated Management costs	\$	
Total Annual costs		\$

Bank References

Lending Institution	Name of Lender	Address	Phone

Bankruptcy Disclosure

If the Proposer or any affiliated business entity of the Proposer or any of the entity's officers, principal, or investors has been adjudged bankrupt, either voluntarily or involuntarily, within the last ten years, please note the date and location of the judgment and the name of the party involved.

Section 5: Public Benefit (15 points)

The Historic Curatorship Enabling Legislation requires that properties be accessible to the public at least twice annually.

- a. Describe the proposed scope and nature of the Public Benefit Element, and any projects / programs / services that will fulfill and/or exceed this requirement (10 points).
- b. Describe how the proposed public benefit will be sustained throughout the term of the lease (5 points).

Section 6: Disclosures

a. Organizational Structure (if applicable)

If the Proposer is acting officially on behalf of an organization, please describe fully the nature of the organization, including:

1. Describe legal structure of the general partners

2. Describe the legal history of the organization

3. Attach a copy of any joint venture agreement, articles of incorporation or trust agreement establishing the organization.

4. Corporate Structure (if applicable)

Please disclose if the Proposer or any other member of the development entity is a subsidiary of or affiliated with any other corporation or firm. Attach references for the development team and/or team members. Please attach an audited financial statement for the general partners and/or the principal development entity. These statements will be held in strict confidence by the Commonwealth.

b. Tax Compliance

Pursuant to MGL Chapter 62C, Section 49A*, I, hereby certify that I have filed all state tax returns, have paid all state taxes required under law, and have no outstanding obligations to the Commonwealth of Massachusetts, Department of Revenue.

Signed under the pains and penalties of perjury on this _____ day of 20_____.

Federal Tax ID No.

Signature

* "No contract or other agreement for the purposes of providing goods, services or real estate space to any ... agencies [of the Commonwealth] shall be entered into, renewed or extended with any person unless such person certifies in writing, under penalties of perjury, that he had complied with all laws of the Commonwealth relating to taxes,"

c. Disclosure Statement Concerning Beneficial Interest

I hereby state, under the penalties of perjury, that the true names and addresses of all persons who have or will have a direct or indirect beneficial interest (including the amount of their beneficial interest accurate to within one-tenth percent) in the proposed project are listed below:

NAME AND RESIDENCE OF ALL PERSONS WITH SAID BENEFICIAL INTEREST:

NAME	ADDRESS	PERCENTAGE INTEREST	

The undersigned also acknowledges and states that none of the above-listed individuals is an official elected to public office in the Commonwealth of Massachusetts, or is an employee of the Commonwealth.

I hereby state, under the penalties of perjury, that the names and addresses of all the firms and personal corporations employing attorneys, real estate brokers, architects, engineers, planners, and surveyors, and all other agents who have acted on behalf of any of the foregoing with respect to this proposal are listed in **Section 1**, above.

SIGNED under the penalties of perjury.

Signature

Date

d. Conflict of Interest

The Proposer covenants that he/she will not employ or retain any company or person (other than a full-time bona-fide employee working for the Proposer) to solicit or secure any agreement related to this RFP, and that he/she has not/will not pay any company or person (other than such an employee) any gift, contribution, fee, commission, percentage, or brokerage fee, contingent upon or resulting from the execution of any agreements.

No member, official or employee of DCR or DCAMM shall have any personal interest, direct or indirect, in any agreement entered into or in the lessee, nor shall any such member, official or employee participate in any decision relating to any agreements which affects his / her personal interest or the interests of any corporation, partnership, or association in which he/she is, directly or indirectly, interested. No member official or employee of DCR or DCAMM shall be personally liable to the lessee or any successor in interest in the event of any default or breach by the Commonwealth or for any amount which may become due to the lessee or to its successor or on any obligations under the terms of this RFP or any agreements which follow. For the purpose of this statement, employees of either agency shall be deemed to include so-called dependent (03) consultant employees.

Date: ______ By: _____

e. Anti-Discrimination

The Proposer agrees that in the construction of the improvements and otherwise through any agreements made hereafter, it shall cause all contractors, tenants and users to comply with all applicable laws, ordinances, regulations and orders from time to time in effect relating to nondiscrimination, equal employment opportunity, contract compliance and affirmative action.

Date: ______ By: _____

PART VII: APPENDICES

A. DEFINITIONS

- B. REQUIRED REHABILITATION TASKS AND COST ESTIMATES
- C. BUILDING CONDITIONS SURVEY+FLOOR PLANS
- D. PRESERVATION STANDARDS AND CRITERIA
- E. MAINTENANCE GUIDELINES
- F. HISTORIC CURATORSHIP ENABLING LEGISLATION

APPENDIX A: DEFINITIONS

HISTORIC CURATORSHIP PROGRAM REQUEST FOR PROPOSALS 2019 - WHITEHEAD HOUSE

APPENDIX A: DEFINITIONS

For the purpose of this Request for Proposal, the following terms shall have the following meanings unless the context otherwise specifically indicates. In some instances, preservation terms have been defined according to the Secretary of the Interior's Standards for the treatment of Historic Properties. Those terms are identified with the notation (SI).

1. Accessibility: In 1990, Congress passed the Americans with Disabilities Act (ADA), which expanded accessibility requirements beyond federal government buildings to state and local government buildings as well as the private sector. The ADA recognizes and protects the civil rights of people with disabilities and is modeled after earlier landmark laws prohibiting discrimination on the basis of race and gender. The ADA requires that buildings and facilities be accessible to and usable by people with disabilities. DCR, through its Universal Access Program and other initiatives, is committed to providing accessible facilities for all visitors.

2. Adaptive Reuse - use of the property in such a way that it retains and reinforces historic character and architectural integrity while accommodating contemporary use. (SI)

3. Building Conditions Appraisals – Reports produced by DCR documenting the conditions of a property's structural systems, plumbing, heating and electrical systems, exterior and interior finishes, building code, accessibility and historic preservation priorities

4. DCAMM - the Division of Capital Asset Management and Maintenance, Commonwealth of Massachusetts, One Ashburton Place, 15th Floor, Boston, MA 02108

5. DCR - the Department of Conservation and Recreation of the Commonwealth of Massachusetts, Division of Planning, Design and Resource Management, Office of Cultural Resources, 251 Causeway Street, 7th Floor, Boston, MA 02114

6. General Laws - the General Laws of the Commonwealth as amended including any rules, regulations and administrative procedures implementing said laws.

7. Historic Fabric - material remains of a historic building, structure or landscape; either original materials or materials incorporated in a subsequent historically significant period as opposed to materials utilized to maintain or restore the structure during a non-historic period. (SI)

8. Historic Integrity - the authenticity of a property's historic identity, evidenced by the survival of physical characteristics that existed during the property's historic period. (SI)

9. Historic Property - any site, building, or structure included which has been deemed by the Department of Conservation and Recreation to be significant to the history of the Massachusetts state forest and park system or which is included or has been determined by the Massachusetts Historical Commission to be eligible for inclusion on the National Register of Historic Places.

10. Mandatory Improvements - work necessary for the rehabilitation of the property as set forth in the Building Conditions Survey or an alternative rehabilitation plan proposed by the Curator & approved by DCR.

11. Lease - a written contract by which rights of use and possession in land, structures and/or buildings is given to another person for a specified period of time for rent and/or other consideration.

12. Management Services - Work and expenditures not considered improvements or maintenance services which allow for the occupancy and management of the property, including utilities, insurance, legal fees, public benefit component; etc. DCR retains the right to determine whether services are considered essential to the management of the property.

13. National Register of Historic Places – The National Register of Historic Places is the Nation's official list of cultural resources worthy of preservation. Authorized under the National Historic Preservation Act of 1966, the National Register is part of a national program to coordinate and support public and private efforts to identify, evaluate, and protect our historic and archeological resources. Properties listed in the Register include districts, sites, buildings, structures, and objects that are significant in American history, architecture, archeology, engineering, and culture. The National Register is administered by the National Park Service, which is part of the U.S. Department of the Interior. Listing in the National Register contributes to preserving historic properties in a number of ways:

- Recognition that a property is of significance to the Nation, the State, or the community.
- Consideration in the planning for Federal or federally assisted projects.
- Eligibility for Federal tax benefits.
- Qualification for Federal assistance for historic preservation, when funds are available.

14. Preservation - the act or process of applying measures to sustain the existing form, integrity, and material of a structure or landscape. [This includes initial stabilization work where necessary, as well as on-going maintenance.] (SI)

15. Preservation Maintenance - the act or process of applying preservation treatment to a site or structure. This includes housekeeping and routine and cyclic work scheduled to mitigate wear and deterioration without altering the appearance of the resource, repair or replacement in-kind of broken, or deteriorated elements, parts or surfaces so as to keep the existing appearance and function of the site or structure, and emergency stabilization work necessary to protect damaged historic fabric from additional damage. (SI)

16. Program ct Manager - the individual assigned by the Commissioner to be responsible for coordinating and managing all activities of the Department under the Historic Curatorship Program.

17. Provisional Lessee Designation - agreement in which a proposer is designated as the selected Curator. Terms and conditions are outlined which must be satisfied prior to the execution of a lease between the Commonwealth and the Curator.

18. Public Benefit – Any programs, projects or other activities that allow the public to appreciate the historic qualities of the Curatorship property equal to or beyond the two annual public access opportunities required by the Historic Curatorship Program Enabling Legislation.

19. Reconstruction - the act or process of accurately reproducing a site or structure, in whole or in part, as it appeared at a particular period of time. (SI)

20. Rehabilitation - the act or process of returning the property to a state of utility through repair or alteration that makes possible an efficient contemporary use while preserving those portions or features of a property that are significant to its historical, architectural, and cultural values. (SI)

21. Restoration - the act or process of recovering the general historic appearance of a site or the form and details of a structure, or portion' thereof, by the removal of incompatible natural or human caused accretions and the replacement of missing elements as appropriate. For structures, restoration may be for exteriors and interiors, and may be partial or complete. (SI)

22. Memorandum of Understanding - revocable agreement between DCR and the designated Curator which allows the rights of use and access to the property, subject to specific conditions, between the time the Curator is provisionally designated and the execution of the lease for a period up to three years.

23. Sustainable Design - Sustainable design seeks to reduce negative impacts on the environment, and the health and comfort of building occupants, thereby improving building performance. The basic objectives of sustainability are to reduce consumption of non-renewable resources, minimize waste, and create healthy, productive environments. Sustainable design principles include the ability to: optimize site potential; minimize non-renewable energy consumption; use environmentally preferable products; protect and conserve water; enhance indoor environmental quality; and optimize operational and maintenance practices. (Definition from General Services Administration)

(SI) From the Secretary of the Interior's Standards for the Treatment of Historic Properties https://www.nps.gov/tps/standards.htm

APPENDIX B: REHABILITATION COST ESTIMATES

HISTORIC CURATORSHIP PROGRAM REQUEST FOR PROPOSALS 2019 - WHITEHEAD HOUSE

REQUIRED REHABILITATION TASKS AND COST ESTIMATES

*Note: Some cost estimates vary from those provided in the original Conditions Assessment due to updated comparable projects. These cost estimates take precedent over those provided in the Conditions Assessment

		T = · · · ·
Category	Task Description	Estimated cost
GENERAL	·	
CONDITIONS	Test & inspect electrical system	\$836
		+++++++++++++++++++++++++++++++++++++++
	Remediate basement dampness with dehumidifiers	\$754
SITE WORK	Remove or prune overgrown vegetation	\$1,507
	Dead limb trees	\$1,507
		<i></i>
	Remove furnishings, carpeting, household items and debris	\$754
	Remove plaster debris	\$678
	New layer of gravel or stone dust on driveway	\$1,588
	Install perimeter French drain	\$12,537
	Regrade around perimeter of house	\$4,179
	Install crushed stone drip edge	\$2,090
CONCRETE	Fill slab cracks at entry slab	\$1,254
MASONRY	Inspect and clean chimney flues, fireboxes and cleanouts	\$2,675
WOOD AND		
PLASTICS	Expose hidden framing for assessment and repair	\$418
	Repair deteriorated clapboards in kind	\$13,373
	Repair damaged cornice moulding in kind	\$7,522
	Repair deteriorated cornerboards in kind	\$7,113
	Replace missing porch post. Provide metal post bases	\$3,260
	Secure loose treads, prep stairs for finish and paint	\$3,544
	Repair damaged pilaster surrounds	\$6,352
	Minor carpentry repairs to wood floors	\$3,343
	Remove deteriorated wood at hearth, provide new beams	\$5,851
	Sister LVL beam to main beam next to basement stair	\$2,675
	Sister LVL beams to beams with insect damage	\$5,349
	Replace plywood sheathing with board sheathing	\$1,588
	Replace rotted section of sill under main entrance	\$6,687

THERMAL /		
ROOFING	Chimney cap	\$836
	Replace door and window flashing	\$5,115
	Replace aluminum flashing with new copper flashing	\$7,021
DOORS AND		
WINDOWS	Repair deteriorated bulkhead door	\$1,254
	Repair wood window sills	\$8,358
	Recondition all window sashes, paint	\$25,075
	Repair side door, paint	\$2,006
	Repair main door	\$2,507
	Clean storm / screens	\$377
	Install historic storm / screen panels	\$5,684
FINISHES	Clean and paint / refinish interior painted floors	\$8,779
	Remove loose flaking plaster in bedroom. Patch and skim coat for	
	finish. Paint.	\$4,179
	Remove loose flaking paint, repair plaster, prep for new finish and	
	paint	\$10,448
	Remove loose flaking wallpaper, repair plaster, prep for new finish	
	and paint	\$16,298
	Remove gypsum wall board and replace plaster to match adjacent	
	rooms.	\$8,358
	Remove living room ceiling tiles	\$5,275
	Prep and paint existing wood work	\$12,119
	Remove tile flooring and install new wood, cork or tile flooring	\$11,701
	Prep and paint exterior of house	\$16,716
MECHANICAL	Design / Install septic system	\$41,791
	Remove and replace plumbing system	\$35,104
	New hot water tank	\$2,507
	Remove and replace tub, toilets and sinks	\$6,687
	Remove and replace heating system	\$66,866
	Provide second story bathroom	\$25,075
ELECTRICAL	Remove surface mounted electrical conduit and outlets	\$334
	Remove and replace electrical system	\$41,791
	Provide new 200 amp service	\$5,015
	Provide all new electrical fixtures	\$8,358
	TOTAL	\$483,068

APPENDIX C: BUILDING CONDITIONS SURVEY

HISTORIC CURATORSHIP PROGRAM REQUEST FOR PROPOSALS 2019 - WHITEHEAD HOUSE

BUILDING CONDITIONS SURVEY WHITEHEAD HOUSE

WILLOWDALE STATE FOREST IPSWICH, MASSACHUSETTS

28 June 2006



ttl-Architects LLC 28 Danforth Street Portland, ME 04101 T (207)761-9662 F (207)761-9696 e-mail: studio@ttl-architects.com

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LIST OF DRAWINGS

All drawings listed were prepared by ttl-architects, LLC using AUTOCAD 2002LT (compatible with AutoCAD 2002).

- Drawing A 1. Existing Conditions Floor Plan
- Drawing A 2. Existing Conditions Elevations
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GLOSSARY OF TERMS

- alligatoring once the bond between paint layers has broken, moisture is able to penetrate the surface cracks causing the wood to swell. The cracking of the paint becomes an overall pattern of horizontal and vertical breaks in the paint layers that look like reptile skin.
- bay a major spatial division of a building marked off by vertical or transverse supports.
- cladding a protective cover, referring to the exposed surface of an exterior wall on a building.
- conservation action taken to prevent decay and preserve the historic significance of a building.
- consolidation the physical addition or application of adhesive or supportive materials into the actual fabric, in order to ensure continued durability of the surfaces or structural integrity.
- corrosion the gradual deterioration of metal by chemical action, as when exposed to weather, moisture, or other corroding agents.
- deteriorated to grow worse in quality or state.
- dutchman a piece of material spliced into an element comprised of the same material where a section has deteriorated or has been removed.
- fabric referring to the building materials and finishes.
- frass bore dust left by wood-boring insects.
- frieze a decorative band, as one along the top of an interior wall, immediately below the cornice, or a sculptured one in a string course on an outside wall.
- LVL Engineered wood members constructed of bonded wood veneers.
- meeting rail the rail of each sash in a double-hung window that meets at the rail of the other when the window is closed.
- muntin a strip of wood separating and holding panes of glass in a window.
- patch to mend, cover, or fill up an opening, a hole or weak spot according to recognized preservation methods.
- ponding in a building, referring to a standing body of water, usually due to poor drainage.
- pressure-treated referring to wood impregnated with chemicals applied under pressure to increase its resistance to decay and insect infestation.

purlin - a horizontal structural member spanning between rafters or trusses to support a roof deck

- repair when referring to historic materials, the least degree of intervention possible such as patching, piecing-in, splicing, consolidating, or otherwise reinforcing or upgrading according to recognized preservation methods to maintain architectural character and historic fabric.
- restoration in a building, returning to its appearance at a particular time in history. Usually the original appearance when construction was completed.
- SHPO abbreviation for State Historic Preservation Officer.
- spalling the chipping or scaling of a hardened concrete or masonry surface, usually caused by freeze-thaw cycles.
- stabilization to prevent or slow down further deterioration. Usually a temporary measure.

substrate - any material that serves as a base or foundation.

swale - a low-lying or depressed stretch of land.

ADMINISTRATIVE DATA

ttl-architects were retained in Late-May 2006 by the Commonwealth of Massachusetts, Department of Conservation and Recreation (DCR), to prepare an assessment for the Whitehead House outlining necessary repairs for the property and associated costs. Minimal records of maintenance or repairs have been kept by the Commonwealth on the Whitehead House.

DCR intends to lease the property to a tenant through the Department's Historic Curatorship Program. This report is to serve as an outline that can be used by DCR and future tenants to help guide repairs and future rehabilitation of the property. This report has been a cooperative effort between the architect and DCR. We wish to thank Katharine Davidge for facilitating the work of this report.

This study has been prepared solely for the Department of Conservation and Recreation. The report is not to be used by any other party, and if it is, ttl-architects, LLC cannot be held accountable for any information contained within the report.

The report contains an assessment of the architectural, structural, and building system elements; prioritized recommendations for repair; sketch plans and elevations; cost estimates and an appendix of supplemental materials gathered during the survey.

PROJECT TEAM

Architect

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1.0 EXECUTIVE SUMMARY

1.1 Introduction

ttl-architects were retained by the Commonwealth of Massachusetts, Department of Conservation and Recreation (DCR) in Late-May 2006 to prepare an assessment for the Whitehead House outlining current conditions and necessary repairs for inclusion in the Historic Curatorship Program. The report contains an assessment of the architectural, structural, and building systems elements; recommendations for repair; cost estimate; and sketch drawings. The following is a summary of the most significant findings. These and other issues are discussed in greater detail in the full report.

1.2 Historical Background

The Small House is a nineteenth century house farmhouse with modest Greek Revival detailing. The house was possibly acquired by Bradley Webster Palmer between 1910 and 1937. The house was donated by Webster to the Commonwealth ca 1937 as part of Willowdale State Forest. Subsequent occupants were employees of the park. The buildings have been unoccupied for a number of years.

1.3 Assessment of Existing Conditions and Recommendations for Repair

ttl-architects reviewed conditions at the Whitehead House on 5 June 2006. The examinations of the property were visual only. Overall, the house is in fair condition and is suitable for reuse as a single family residence.

- Deterioration of the building's materials and systems has occurred as the result of a lack of maintenance and regular activity at the vacant building. Repair of the deterioration will be significant. Through our firm's field assessment a number of deteriorated elements were identified. Prioritized recommendations for the repair and preservation of deteriorated elements are included in the body of the report.
- Moisture penetration of the building's exterior shell and the active infestation of pests has occurred due to insufficient or inappropriately installed temporary protection. Pests need to be controlled or exterminated. The exterior of the building needs to be sufficiently protected to control further deterioration of the building's elements from moisture infiltration. Until the building is rehabilitated it should be maintained and monitored for further deterioration.
- The interior of the building is littered with debris. In particular, the basement is filled with unwanted materials, furniture, and trash. Furnishings, carpets, debris, and trash should be removed from the house, especially in the basement to facilitate maintenance and monitoring, to improve air circulation, and inhibit moisture retention and mold growth.
- Existing mechanical and electrical systems have been exposed to excessive moisture over a long period. Long term exposure to excessive moisture may have led to the growth of mold or the development of rust. In addition the electrical system is under-designed for residential use and does not have safety features like ground fault interrupters. It is likely that these building systems are no longer safe for use.
- The historic house does not meet the requirements of the ADA. If the house is to used as a private residence, the ADA will not apply. If the house is to be reused, then the minimum building requirements of the ADA must be met to the maximum extent feasible.

- The building does not meet the State Energy Code. The insulation values of the building's walls, roof, and windows should be improved to the maximum extent feasible to meet State Energy Code requirements.
- The building does not meet basic life safety standards. There are no smoke detectors, heat detectors, carbon monoxide detectors, a sprinkler system or lightening protection. At a minimum a monitored and hard-wired smoke detection system should be installed until the house can be rehabilitated.
- Existing historic details should be preserved and restored. New materials and systems should be installed with care and creativity to minimize the destruction of extant historic material and detailing.
- Additional data is necessary to have a complete understanding of the scope of necessary repairs. Additional data that should be developed includes:
 - A boundary survey noting the location of site systems.
 - A hazardous materials survey.
 - Localized destructive testing to ascertain the condition of concealed and/or readily inaccessible building elements, i.e. structural framing.

1.3 Structural Assessment

Structural examination of the Whitehead House was visual only; no destructive testing was undertaken to assess concealed or readily inaccessible areas of the structure. Exposure and investigation of the second floor framing, the kitchen addition roof framing, exterior walls and exteriors of sills is necessary. Given the condition of what could be observed, however, it is expected that undamaged framing for these components should be able to satisfy current building code structural requirements for a residence.

- The damaged and notched first floor framing should be repaired by conventional reinforcing methods. Similar repairs might be necessary for any damaged components that have yet to be investigated.
- The rotted hearth brick support could be repaired with new brickwork. However the hearth serves an ornamental fireplace and re-support with galvanized steel lintels would seem more appropriate. The historic character of the original chimney has been lost due because of previous heating system renovations.
- The entry roof posts should be replaced and set on pressure-treated blocking to avoid recurrence of the rot-out that claimed the existing missing post.
- The rear entry slab on grade should have its cracks filled with a flexible epoxy product and should be sealed with a clear sealer periodically to repel moisture infiltration that causes freeze-thaw cracking.
- Control of moisture in the basement should be made a priority through mechanical or passive methods. Re-grading the exterior perimeter of the house to lower the exterior grade around the sills should be considered to decrease insect accessibility (in lieu of chemical treatments or replacement of sills with treated lumber).

1.4 Cost Estimate

Based on a review of the existing conditions prioritized recommendations for preservation and repair were made. ttl-architects prepared a cost estimate for each priority level. Priority One recommendations are the most urgent and should be completed as soon as possible to stabilize and protect the structure from damage from weather and pests. Priority levels two and three are less urgent, but should be completed within the next five years as part of a rehabilitation plan. In addition, recommendations were made for improvements that would be necessary if there was a change of use from residential to commercial or institutional. The cost for these alternative use improvements are included in the cost estimate. Every effort was made to include work that can be anticipated at this time. Because a detailed survey involving selective demolition and probing was beyond the scope of this report, an allowance of 15% should be made for hidden conditions. All budget cost are in 2006 dollars and no adjustments have been made for inflation.

Total Priority I Construction Cost	\$ 48,000
Total Priority II Construction Cost	\$455,785
Total Priority III Construction Cost	\$45,655
Alternative Use Construction Cost	\$309,095
Total Phased Construction Cost	\$858,535

1.5 Bibliography

ttl-architects consulted a variety of sources that were made available by the Department of Conservation and Recreation, and that were found at the Massachusetts Historical Commission, Ipswich Public Library, Newburyport Public Library, and that were available online.

2.0 HISTORICAL BACKGROUND

The Small House is located at 294 Linebrook Road along the northern edge of Willowdale State Forest. According to the 1983 MHC survey form (See Appendix) the Small family lived in this house ca 1910.

The Small House is a nineteenth century farmhouse with modest Greek Revival detailing and was likely built ca. 1840 as determined by visual and architectural assessment. The house does appear on the 1893 USGS survey map. It also appears on the 1872 Atlas of Essex County as the residence of DG Chapman, possibly Daniel Chapman, the son of Joseph and Hannah Chapman, who married his wife Catherine in 1840.¹ Further deed research, beyond the scope of this report, may determine the identity of nineteenth century and early twentieth century residents.

The survey form also identifies a large wood shingle barn on the property.

The house was possibly acquired by Bradley Webster Palmer between 1910 and 1937. Bradley Webster Palmer, a prominent Boston attorney, began acquiring property along the Ipswich River in 1891 when he moved to Boston. The house was donated by Webster to the Commonwealth ca 1937 as part of Willowdale State Forest. Subsequent occupants were employees of the park. The building has been unoccupied for a number of years.

¹ Vital Records of Ipswich to the year 1849.

CONDITION ASSESSMENT AND RECOMMENDATIONS

INTRODUCTION

ttl-architects and Struble Engineering reviewed conditions at the Whitehead House on 5 June 2006 and on 28 June 2006. The weather on 5 June was overcast skies with an ambient temperature of 66° F and the relative humidity was 45. The local weather pattern prior to the visit had been exceedingly wet with record amounts of rainfall.

The examinations of the property were visual only. Examinations of the buildings' elevations were made from the ground. Examination of the residence's interiors included the first and second stories. The interior of the shed was not inspected from within due to the deteriorated and unsafe condition of the outbuilding. The goals of the visual examinations were to determine the condition of existing fabric and current needs for repair.

This chapter summarizes the general findings of the present conditions. After each finding, general recommendations for conservation and repair are provided. The recommendations have been prioritized as level one, two, or three. Level one recommendations are generally ones that are required to stabilize the structure, prevent further deterioration, or present immediate life safety/code concerns. Priority level two items would be necessary to make the buildings habitable, and include complying with modern life safety and code issues. Priority three items are primarily cosmetic repairs or the restoration of earlier fabric that has been altered. Level one recommendations should be completed within the next one to two years, and all recommendations should be completed within the next five years unless indicated otherwise.

Conditions are defined as good, fair, or poor based on criteria developed by the National Historic Landmark Condition Assessment Program. All work should be performed by a firm having not less than five (5) years successful experience in comparable work for at least three (3) buildings similar to, or qualified to be listed in the National Register of Historic Places, and employing personnel skilled in the restoration processes and operations indicated.

An element is evaluated as Good when:

- the element is intact, structurally sound and performing its intended purpose;
- there are few or no cosmetic imperfections;
- the element needs no repair and only minor or routine maintenance.

An element is evaluated as Fair when:

- there are early signs of wear, failure, or deterioration, though the element is generally structurally sound and performing its intended purpose;
- there is failure of a sub-component of the element;
- replacement of up to twenty-five percent of the element or replacement of a defective sub-component is required.

An element is evaluated as Poor when:

- the element is no longer performing its intended purpose;
- the element is missing;

- deterioration or damage affects more than twenty-five percent of the element and cannot be adjusted or repaired;
- the element shows signs of imminent failure or breakdown;
- the element requires major repair or replacement.

Any necessary repairs for Whitehead House should follow several basic principles common to the maintenance of historic buildings and adapted from *The Secretary of the Interior's Standards for the Treatment of Historic Properties* published by the National Park Service and available on line at http://www2.cr.nps.gov/tps/standquide/index.htm.

- 1. Deteriorated architectural features should be repaired rather than replaced wherever possible.
- 2. When replacement of original building material is necessary, new materials should match the material being replaced in composition, design, color, texture, and other visual qualities.
- 3. Replacement of missing architectural features should be accurately duplicated based on historical or physical evidence rather than conjecture.
- 4. Repair methods, such as surface cleaning of the building, should be undertaken using the gentlest methods possible.

These principles recognize that historic materials and details have proven records for durability and compatibility, and that a small amount of maintenance at regular intervals avoids large investments in repairs. If new materials are incorporated into the structure, care must be taken to assure that their physical properties do not conflict with the physical properties of surrounding materials. If materials are improperly applied, it may cause or accelerate physical deterioration of the historic building.

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Whitehead House Willowdale Sate Forest Ipswich, MA



Figure 1. Whitehead House from Linebrook Road



Figure 3. North Elevation with ell



Figure 2. Whitehead House from rear yard



Figure 4. East elevation of ell.

SITE

The house is located at 294 Linebrook Road on the northern edge of Willowdale State Forest. The area around the house is generally flat, the rear yard slopes downhill towards the house and the front yard slopes steeply downhill to the roadbed. (See Appendix for Site Plan)

Historic maps and photos indicate a large barn was present onsite as late as the 1970s. (See Appendix for MHC Form). A large flat concrete pad to the southwest of the building maybe the location of the former barn. There is also evidence of a small herb garden, now grown wild on the east side of the main house.

The site is in fair condition. Unmaintained site materials are holding moisture close to the building and hindering air movement necessary to dry out the building siding and exterior trim. Unmaintained site materials include overgrown foundation plantings, accidental trees, and unmown grasses. Some mature trees on the east and west side of the building have grown close to the house. A covered well is located to the southeast of the house near the ell.

The driveway is overgrown and consists of mainly crushed stone and gravel.



Figure 9. Driveway.

Priority One

- Overgrown vegetation around the buildings should be pruned and/or removed. Accidental trees should be removed. The grasses should be routinely mowed.
- Trees should be dead-limbed and unhealthy or dead trees should be removed.
- A boundary survey of the house lot should be completed. The survey should also note the location of any wells, septic, town water, and sewerage lines

Priority Two

- A new layer of stone dust, gravel, or crushed stone should be added to the unpaved drive and walk ways.
- Lower grade around perimeter of house to facilitate drying of the siding and framing and to direct drainage around the house perimeter.

Building Elements

The Greek Revival house sits close to the street, but faces the driveway to the west. A one story gable addition housing a kitchen is located at the east of the hall and parlour house. The main block of the house has six rooms: a living room, a dining room, three bedrooms and one downstairs bathroom.

The house is unoccupied and in generally good condition. There is evidence of deferred maintenance and pest infiltration. The interior ambient temperature during the assessment was 66° F and the relative humidity was 54%. A relative humidity above 70% will encourage mold and mildew.

Foundation & Concrete Slabs

Additional information on the foundation may be found in the attached Structural Engineering Report.

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The foundation under the main house has a rubble stone foundation with wide mortar joints. The walls are in good condition. The foundation walls of the ell are poured concrete and are in good condition with some older minor cracks. The basement floor is a poured concrete slab. Because of the extensive amount of debris in the basement, a thorough examination of the slab was not possible.

The entry slab is in fair condition with some minor cracking.

A wooden bulkhead door is located on the south side of the house and forms part of the porch floor.

Priority Two

- Fill slab cracks at entry slab with flexible epoxy and seal.
- Repair bulkhead door. Provide wood boards, new flashing and reinstall salvage hardware.



Figure 6. Chimney

Chimneys

Additional information on the chimney may be found in the attached Structural Engineering Report.

There is one chimney, serving the building furnace. The chimney is not capped (Figure 6). The chimney and flashing are in good condition.

A former chimney serving the dining room firebox and, at one time, a kitchen stove has been removed. The former chimney's supports in the basement have also been altered and are in deteriorated condition.

Priority One

Provide chimney cap with a screen that will shield the flues from rain and snow and prevent the entrance of pests, without limiting ventilation.

Priority Two

The chimney flue and cleanouts should all be inspected and cleaned by a certified chimney sweep or mason.

Framing

Additional information on the foundation may be found in the attached Structural Engineering Report.

The framing consists of full cut lumber in the main house and dimensional lumber construction in the ell. The main house floor framing is a purlin and beam system, while the ell is framed with joists resting on the foundation sill plate.

The roof and second floor framing is in good condition, although somewhat undersized for contemporary standards. Some evidence of staining and deterioration of the interior plaster from leaks around the second floor eaves indicated that there may be some deterioration of the roof and floor framing beyond and below, although it is not accessible for inspection at this time.

The first floor framing is in fair condition. There is evidence of insect damage, probably fostered by the damp environment, in the main beams and fireplace support. In addition, the main beam bordering the stair has been excessively notched and should be augmented.

Further investigation of the sills is necessary. The sills of the main house are not readily available from the exterior or interior. The sills of the addition appeared fine from the interior, but were not visible from the exterior.



Figure 7. Existing porch post.



Figure 8. Replaced Sheathing Boards

The porch roof is in fair condition. Some sheathing has been replaced with inappropriate plywood instead of the original board sheathing (Figure 8). One 6x6 lathe turned post is missing from the west edge of the porch.

Priority One

- Investigate sills to determine condition by removing clapboards in select locations.
- Prepare selected areas for removal of plaster and floor boards to examine floor and roof framing at areas affected by past leaks.
 *2019: Replace rotted section of sill under main entrance

Priority Two

- Replace missing porch post. Examine remaining posts for rot. Provide new adjustable metal bases for each post lag bolted to concrete pad.
- Sister Laminated Veneer Lumber (LVL) beam to main beam next to basement stair.

Whitehead House Willowdale Sate Forest Ipswich, MA

- Sister LVL beams to beams with insect damage.
- Remove deteriorated wood at hearth. Repair using galvanized steel lintel angles.

Priority Three

Replace plywood framing with board sheathing to match adjacent materials.





Figure 9. Main roof

Roofing & Drainage

The main house and rear ell are covered with asphalt roofing shingles. The roofing shingles are in good condition.

The roof flashing is aluminum and is in fair condition. The flashing at the junction of vertical walls and rooflines is not readily visible in all areas. The flashing that was visible appears to be in fair condition, with some rusting visible. The flashing under the second floor windows above the porch was inappropriately installed and should be replaced.

There are no gutters or downspouts on the Whitehead House. There is some evidence that the rear ell had a gutter on the south side. Splashback on the bottom courses of clapboards has led to deterioration of the clapboards as well as on the vertical portions of the walls above the rear ell and porch roofs.

The flashing over the main door and windows is in poor condition and should be replaced.

Priority Two

- Replace aluminum flashing with new, preferably copper, flashing at all locations.
- Replace flashing over the door and windows.

Priority Three

Install a crushed stone drip edge.


Figure 11. Deterioration of siding. Figure 12. Deteriorated and replacement siding.

Siding & Wood Trim

The main house and ell are clad in painted wood clapboards. The siding is in fair condition. There are several areas of deterioration where clapboards are exposed to water running off the lower or adjacent roofs. In these areas clapboards are cracked, split, and wet. Other areas of clapboard deterioration occur in the first several courses above the foundation; particularly on the east side of the house and north face of the ell where there is little natural ventilation.

There are several areas of wood trim deterioration or replacement. The cornice returns and the bottom of the main door surround are in poor condition. Some holes and missing trim details, especially on the north elevation may be allowing the infiltration of pests.

Priority One

Missing or deteriorated exterior elements should be replaced or temporarily secured from pests.

- Repair missing and damaged cornice return moulding. Dutchmen should be used whenever possible in lieu of complete replacement of original.
- Repair the damaged door surround and sill trim at the main entry door. Dutchmen replication pieces should be spliced into the original.
- Replace deteriorated clapboards.
- Replace deteriorated sections of corner boards with Dutchmen.



Figure 13. Main entry door, exterior



Figure 15. Interior doors

Doors & Windows

The exterior of the windows and doors on the first floor do not have external protection panels. Several panes are cracked from vandalism, and an entire sash was destroyed on the south ell window by vandals and is boarded over from the interior with a plywood panel.

The windows are in fair condition and need minor repairs. There are several cracked window panes, missing muntins (Figure 16) and some missing hardware. The windows have storm/screen panels.

The exterior doors are in fair condition. The front door is a four panel wood door. The rear door is a six panel wood door. Both doors have modern aluminum storm/screens and are in fair condition. The doors need moderate repair, including weatherstripping, hardware rehabilitation, threshold replacement, some shaping to ease operation, and painting.



Figure 14. Main entry door, interior



Figure 16. Unprotected windows

In addition there is a painted wood board bulkhead door on the south elevation that forms part of the floor of the porch. The door and hardware appear in fair condition.

The interior wood four panel doors and hardware are in good condition.

Priority One

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 The plywood protection on the kitchen ell should be installed on the EXTERIOR of the window to prevent water and snow from penetrating the window sill and leaking into the wall cavity below.

Priority Two

- In areas of moderate deterioration, windows sills should be repaired using an epoxy wood consolidant. In areas of more advanced deterioration, sills should be repaired with Dutchmen and wood consolidant. Replacement of sills should only be considered as a last resort.
- Remove and recondition all window sashes. Construct new window sash for south ell window. Most windows needs minor repairs including re-glazing, hardware cleaning, and painting. A portion of the windows will need repair of missing wood muntins and missing or cracked glass panes. All missing or broken glass should be replaced with salvaged historic glass or a historic reproduction glass.
- The exterior of the main door needs moderate repair. Repairs may need to include Dutchmen or wood consolidant, especially at the bottom rail and at locations where various handles and locks have damaged the original material. Door will need weather stripping; and some modification to ease swing and square to frame. Prep surface and paint.
- The porch entry door needs moderate repair. Repairs may need to include Dutchmen or wood consolidant, especially at the bottom rails and at locations where various handles and locks have damaged the original material. Door will need weather stripping and some modification to ease swing and square to frame. Prep surface and paint.
- Repair loose and deteriorated boards in kind on the bulkhead on the porch. Salvage hardware, refurbish, and reinstall.

Priority Three

- Remove worn and broken aluminum storm windows. Exterior historic storm/screen panels should be installed to protect the historic materials, guard against vandalism, and reduce air loss.
- Clean storm/screen doors.







Figure 18. Kitchen

Figure 20. Stair.

Interior Fixtures & Furnishings

Although unoccupied the building contains household furnishing and fixtures. (Figure 17, 18, 19 & 21) There is some debris, small household items, area rugs and furniture throughout the house. The basement in particular is full of debris.

First Priority

Remove furniture, carpeting/rugs, household items, and debris.



Figure 19. 1st Floor pantry.

Interior Finishes

Interior wood trim & case work:

The small pantry off the kitchen has a large built-in cabinet and shelving. There is additional shelving in the adjacent pantry. A small closet adjacent to the fireplace has brackets for shelving. The interior casework is in good condition.

The painted wood base board is present on the first and second floors of the main block and the kitchen ell. The simple Greek Revival style fireplace surround is painted wood. The wood trim, except for minor crazing and peeling, is in good condition.

The central stairs have a simple painted wood vertical baluster. The painted treads are protected by stairs rugs that are worn.

Priority Two

- Replace closet shelving.
- Remove worn stair rugs, secure loose treads, prep for finish and paint.
- Retain historic layers of paint. Do not remove paint, except in areas where loose and flaking. Paint over existing painted woodwork as required.



Figure 21. Second Floor Bedroom

Ceilings:

The ceilings are primarily plaster on wood lath and are generally in good condition. There is some minor cracking of the plaster and the paint is flaking. In the second floor south bedroom, there is a plaster ceiling failure and the ceiling is buckling (Figure 21). The plaster in this room is in poor condition.

The living room ceiling is tiled. These tiles should be tested for the presence of asbestos.

Priority One

- Remove plaster debris in second floor bedroom.
- Test ceiling tiles for presence of asbestos.

- Remove loose flaking paint, repair minor cracks, replace missing plaster, secure loose plaster, skim coat as required and provide a smooth surface for finish painting.
- Remove living room ceiling tiles. Abate if necessary by a certified professional. Restore plaster ceiling.





Figure 23. Living Room.

Walls

The walls are primarily plaster on wood lath. All of the rooms except the kitchen and north bedroom are wallpapered. The wallpaper is dirty and worn. The south bedroom and stair hall have loose peeling paper that is water stained.

The walls in the lower stair hall have been repaired with gypsum board instead of plaster. (Figure 20.)

Priority Two

- Remove wallpaper. Repair plaster walls at areas of removal. Skim coat as required and provide a smooth surface for finish painting.
- Un-papered plaster walls: Remove loose flaking paint, repair minor cracks, replace missing plaster, secure loose plaster, skim coat as required and provide a smooth surface for finish painting.

Priority Three

Remove gypsum wall board and replace plaster to match adjacent rooms. Provide a smooth surface for finish painting.

Flooring

The kitchen has tile flooring that is worn, dirty and in poor condition. These tiles should be tested for the presence of asbestos.

The remainder of the flooring on the first and second floors is painted pine boards and although worn, they are in good condition. There are area rugs and carpet in several of the rooms, including the living room, stair hall, and south bedroom that have provided some protection from wear to the wood floors.

Priority One

- Remove debris and carpets from wood flooring.
- Test kitchen tiles for the presence of asbestos.

- Remove the tile flooring in the kitchen. Abate if necessary by a certified professional. Install new wood flooring or repair and refinish existing wood flooring underneath.
- Provide minor carpentry repairs to fill cracks, gaps, and to secure loose boards where needed on the pine board floors.
- Clean and paint interior painted floors without extensive sanding or removal of underlying paint.

Painting

Most of the interior painted surfaces are in good condition. There is some major flaking of paint on ceilings where there is evidence of past leaks on the second floor. Testing of the paint for color and the presence of lead was not part of this report, but based on its age the paint should be assumed to have a high presence of lead content. Encapsulation is preferred over stripping to avoid damage to the historic wood fabric.

Priority One

 The painted surfaces on the interior and exterior should be tested for the presence of lead paint and abated where necessary by a certified professional with experience working on National and State Register Properties.

Priority Two

- Prepare and paint all peeling and bare areas and new clapboards on the exterior of the house.
- Provide paint analysis on interior wood trim in main block to determine original and subsequent finishes.
- Clean and paint interior wood trim without excessive sanding or removal of underlying paint.

Plumbing System

Water service is provided by a well. The house has been winterized and the plumbing systems drained. The water supply and waste piping is a mixture of cast iron and copper piping. It was unclear if the house is served by a septic system or public sewer. The septic system, if it exists, is of unknown location and condition.

The kitchen has an outdated sink and faucet of mid-twentieth century design. The sink is in poor condition. The bathroom fixtures are of a mid-twentieth century design and in poor condition.

- Provide a new plumbing system. Work should conform to Massachusetts State Plumbing Code 248 CMR 2.0
- Remove and replace the hot water tank.
- Remove existing toilets, tubs and sinks. Install new low-flow toilets. Install tubs and sinks with mixer valve faucets.
- Design and install new septic system OR connect to City sewer if available.
- New plumbing lines should be concealed in cabinets, closets or new wood-cased chases. Care and creativity should be used to minimize the removal of historic plaster ceilings, walls, and flooring.

Priority Three

Provide an additional bathroom on the second floor directly above the existing bathroom.

Mechanical System

The existing heating system is a forced hot air system provided by galvanized ducts and a furnace. The condition of the furnace appears fair but given the recent and perhaps cyclical flooding in the basement, the condition may be poor. In addition, the constant damp in the basement and first floors may have led to the development of mold within the air ducts, although the condition of the ducts was not evaluated as part of this scope of work.

Priority Two

- The heating system, including all ductwork, the boiler, and fuel supply piping should be inspected. It is recommended that the system be removed and replaced. The existing supply floor vents could be reused if they can be satisfactorily cleaned.
- New ductwork should be located in concealed or partially concealed spaces like the closets whenever possible. Care and creativity should be used to minimize the removal of historic plaster ceilings, walls, and flooring.

Electrical System

The electrical service is an overhead feed from a pole to the north of the house. The external vertical wiring and mast are located on the main street façade. The external wiring is cracked and deteriorating. There is a modern electric panel with circuit breakers. The internal wiring is a mix of modern and mid twentieth century wiring.

The interior outlets are surface mounted on the wood baseboard, the outlets are not grounded, and outlets are not provided on every wall. Most of the rooms do not have any ceiling fixtures or wall mounted lights, except for the kitchen which has a single ceiling mounted fixture. There is no lightening protection system.

Priority One

- Retain a licensed electrician to inspect the electrical system.
- Grounded lightning protection system.

- Remove all surface mounted conduit and outlets.
- A new electrical system. Include hard-wired smoke detectors and ground fault protection in bathrooms and in the kitchen. Some of the newer wiring may be salvageable for reuse. All new work should conform to Massachusetts Electrical Code 527 CMR 12.00.
- Any new electrical chases should be located in concealed or partially concealed spaces, like closets, whenever possible. Horizontal runs may be located within the walls cavity by temporarily removing the baseboard and pulling lines vertically to new wall outlets. Care and creativity should be used to minimize the removal of historic plaster ceilings, walls, and flooring.

CODE REQUIREMENTS

Building Codes

Historic Structures are irreplaceable pieces of our cultural heritage with immeasurable value. Special consideration is necessary to design fire and life safety into such structures without sacrificing historic integrity. Historic structures predate modern codes and are usually not equipped with fire detection, notification and suppression systems. The greatest threat to historic buildings and their contents is fire. However, the preservation of a structure is secondary to the safety of the occupants. Preventative measures to ensure life safety will also save the fabric of the building. Historic buildings need to be provided with safeguards sufficient to allow for a reasonable degree of safety for occupants during an emergency with a minimal intrusive impact on the historic character.

Most ordinances regulating building construction and fire safety are written primarily for new construction but have a provision that accords special considerations for historic buildings. *Massachusetts 780 CMR 34.00* provides guidance in making repairs, alterations, additions, and changes of use to existing buildings. Structures that qualify either as totally or partially preserved historic structures may meet alternative and often, less stringent, guidelines. Due to the significance of structures, a limited amount of flexibility in the regulations is allowed and should be discussed with local enforcement officials. Generally, in historic buildings, if an effort is made to significantly increase the level of life safety protection with a reasonable or equivalent level of life safety, the requirement to comply with all building code requirements may be reduced.

A complete code review was not carried out for the Whitehead House, but general conditions and egress requirements have been noted below:

- Doors do not meet hardware and egress requirements.
 - If the building retains its historic use as a residence and the doors are not altered, but merely repaired, they need not comply with the State Building Code.
 - If the house is rehabilitated for **commercial or institutional use** the door swings and hardware would need to be rehabilitated to meet current code requirements, including outward swinging doors, lever hardware, and interconnected locks.
- The stairs do not meet the width, handrail, guardrail, and riser/tread requirements for new egress stairs.
 - If the building retains its historic use as a residence and the stairs are not altered, they need not comply with the State Building Code.
 - If the house is rehabilitated for commercial or institutional use, a new stair would need to be built, preferably in an addition, to meet current code requirements. A new stair would need to include fire doors to provide a smoke free egress route.
- The insulation values of the building's walls, roof, and windows do not meet State Energy Code requirements.
 - If the building retains its historic use as a residence and the windows, roof and wall cavities, are not altered the house need not comply with the State Energy Code.

Whitehead House Willowdale Sate Forest Ipswich, MA

- New exterior storm windows with a low profile may be added to increase the efficiency of the windows without destroying the historic character of the residence.
- All the exterior doors and windows and windows should be weatherstripped as part of their scope of repair.
- The electrical system is under-designed for residential use and does not have safety features like ground fault interrupters.
 - A complete, new electrical system including service, wiring, and fixtures and outlets should be provided.
- There are no smoke detectors, heat detectors, carbon monoxide detectors, a sprinkler system or lightening protection.
 - A complete, new electrical system should include hardwired smoke, heat, and carbon monoxide detectors.
 - A lightening protection system should be installed.
 - If the house is rehabilitated for commercial or institutional use, a residential grade sprinkler system should be installed. Care should be taken to hide vertical chases in existing closets or secondary rooms. Horizontal runs may be painted to match adjacent finishes. Any penetrations of historic moulding, paneling or casework should be undertaken by a carpenter with experience working on National and State Register properties.
 - If the house is to be rehabilitated for **commercial or institutional use**, a new electrical system should include exit signs and egress lighting.
- There are no fire separations to inhibit the spread of fire from one area of the building to another.
 - If the building retains its historic use as a single-family residence fire separations are not required.
 - If the building were used for a **multifamily, commercial or institutional use**, fire separations would be required between different uses.
- The framing is post and beam construction.
 - The framing in the building is generally adequate for residential use, except at areas of deterioration.
 - If the building were to be used for commercial or institutional use, the framing would need to be upgraded to meet current load and deflection requirements.

Accessibility

The Americans with Disabilities Act (ADA) requires that "persons with disabilities are to be provided accommodations and access equal to, or similar to, that available to the general public. If the Whitehead House was to retain a residential use, the ADA requirements would not apply. The Whitehead House is not currently accessible. If the buildings are to be used commercially or by an institution, there would need to be some physical changes made to accommodate the requirements of the ADA.

A commercial property typically needs to be accessible if it is providing goods or services to the public. Even if it is not, there should be some flexibility to accommodate for potential employees who made need accessibility features. If the house is to be used for commercial purposes, they will need to meet the guidelines for alterations to historic properties. The ADA provisions for alterations to historic properties note that alterations ought to be in full compliance with the alteration standards for other types of buildings. If by following the usual standards, the historic significance would be destroyed or threatened, alternative standards maybe used. The ADA also requires review by the appropriate local or state access board. At a minimum, the building should meet the following requirements:

- An accessible route should be provided from a convenient designated handicapped (HC) accessible parking spot to an accessible entrance that is a primary public entrance. The route from the designated HC accessible parking spot shall have a width of 36 inches clear and have a continuous common surface.
- A van accessible parking spot should be provided and clearly designated with the proper signage. The space should be located within 200 feet of the main entrance. **OR** A drop off area within 100 feet of the accessible entrance should be provided.
- An accessible entrance that is clearly identifiable as a primary public entrance with access to all public areas and accessible routes on the interior of the buildings should be provided.
- An accessible route connecting all public areas, accessible toilet rooms, and the accessible entrance should be provided.
- One unisex wheelchair accessible toilet and/or bathing room located on an accessible internal route in each building that is to be occupied should be provided.

Recommendations

Making the Whitehead House accessible is problematic, but could be achieved with major alteration to the exterior character of the house with an addition. A reconstructed kitchen ell could provide a new at-grade entrance, perhaps incorporated into a farmer's porch. An accessible route could be easily integrated from a designated parking space in the improved driveway and small parking lot to the southwest of the house.

The existing first floor bathroom is too small for a handicap accessible toilet room and is not on an accessible route. None of the doorways are wide enough to meet ADA clearance requirements. A new toilet room would best be provided in a new entry addition.

ADDITIONAL COMMENTS

The Whitehead house is a small modest residence. With some interior alterations to accommodate modern kitchen and bathroom features, it could easily serve a modern family of modest size. Given its setting and site, the house could also be expanded with an addition on the east side of the house. Any new addition design should follow *The Secretary of the Interior's Standards for the Treatment of Historic Properties*. An addition that is compatible with the massing, size, scale, and features of the Whitehead House, while differentiating the new work from the existing historic fabric, could provide added space for a single family or could accommodate features required to rehabilitate the house for a new commercial, multifamily, or institutional use.

WHITEHEAD HOUSE, LINEBROOK ROAD, IPSWICH, MA BUILDING CONDITION SURVEY – STRUCTURAL SYSTEMS FOR

MASSACHUSETTS DEPT. OF CONSERVATION AND RECREATION (DCR).

> JUNE 28, 2006 REVISED

JEFFREY W. STRUBLE STRUBLE ENGINEERING, LLC 603 MAIN STREET READING, MA 01867-3002 (781) 942-3845 (781) 942-7083 FAX

Description and Condition of Structural Systems

A. Roof Framing

There are two main gable roofs for this house. The first roof terminates the two-story original section; the second roof terminates the single story kitchen addition extending out to the east from the original section. Both roofs are double-pitched. The higher roof has about a 7:12 slope and the lower roof has a shallower 4:12 slope (approx). A small projecting hip roof is located over the rear entry (see Fig. S1).





The roof framing over the two-story original section is comprised of opposing sloped 3"x5" full-cut hardwood rafters spaced at approximately 32" o.c. and overlain with 3/4"-1" thick wide horizontal planks (see Fig. S2). Access to the roof framing was limited and the rafter connections at the eaves could not be observed. However, the abutting condition of the rafters and the absence of a ridge board suggests mortise and tenon joints. Given that the second floor framing used similar stock (see below), it is probable that the rafters are tenoned into the second floor joists, creating, in effect, triangular roof trusses. Ceiling joists located approximately 3' below the ridge further tie the rafters together.





Figure S2

The roof planes were, for the most part, straight and true, indicating good deflection characteristics of the rafters/ties. The gable end wall was studded with $3^{*}x5^{*}$ full-cut members and sheathed with $3^{*}a^{*}-1^{*}$ thick wide horizontal planks (see Fig. S3).



Figure S3

The framing that could be observed appeared to be sound and dry with no obvious stains from past water leakage. Some roof planks near the ridge had moderate concentrations of nails, indicating repairs or shielding of the roofing. Plaster in the closets nearest the eaves on the west side of the house showed evidence of staining, swelling, and cracking from water infiltration. This condition was particularly evident in the front (north) room near the location of the furnace chimney. Further investigation of the entire roof framing system is warranted via exploratory holes in the finishes. The existing roof's framing system is adequate to carry the snow loading required by CMR 780 (Zone 2 - 30 psf) plus up to 17 psf of dead load. This additional capacity is sufficient for the existing asphalt roofing and plaster ceilings (neglecting the contribution of the ceiling ties). Future use of slate roofing would require alteration to the existing framing.

The roof framing over the one-story kitchen addition could not be observed. Given the framing patterns in the main house, it can be inferred that this roof uses full-cut dimensional lumber at closer spacings (16"-24"). Sloping rafters sheathed with narrow planking and the level ceiling in the kitchen suggests that matching ceiling joists are acting as collar ties to resist outward thrusts. The roof planes in this area were also flat, indicating good deflection behavior under loads. The capacity of this roof system and its compliance with current building code requirements cannot be ascertained without field documenting the size and spacing of the framing members.





The entry roof is bordered at its eave line with substantial 4"x8" members that support sloping planking directly (see Fig. S4). The 4"x8" members are in turn supported by lathe-turned 6"x6" posts at the corners and middle. The western-most lathe-turned 6"x6" post is missing, apparently having rotted at its base and been removed. While the missing post should be replaced, the roof has maintained its form and levelness (see

Fig. S5). The level condition of the roof is probably due to the angled framing and sheathing which acts as a folded plate. This behavior should not be depended upon, though, to resist code-mandated snow loads, including drifting snow. The remaining posts should be checked for internal damage near their bases.



Figure S5

B. Floor Framing

Second Floor - The second floor framing could not be observed directly due to ceiling finishes, including the area under the eave closets where water infiltration is suspected. One small access hole in the front room ceiling revealed that 3"x5" hardwood members at approximately 19"o.c. support rough wide planking (see Fig. S6). These members presumably span from the gable ends to the bearing walls or beams at the midsection of the house. The sheathing was ³/₄"-thick wide irregular planks. Given the regularity and symmetry of the room layouts on both the first and second floors, similar framing conditions may exist on the whole floor. Similar stock is probably found at the shorter spans at the center area (stairs and small bedroom). The observed framing appeared

sound and dry. The strength of the framing members appears to be adequate to withstand the 30 psf live load requirement for a bedroom by the current building code. The capacity also allows for a plaster ceiling's dead load, but deflection of the 3"x5" purlins under these loads would exceed current building design standards.



Figure S6

First Floor – The first floor framing was viewed from the basement below. Two different framing schemes were noted. In the original two-story section, 3"x5" purlins support irregular wide planking framed to main 8"x8" beams. The 8"x8" beams run along the middle of the floor and under the interior bearing walls. The beams are supported with 6"-diameter posts at their mid-spans and/or intersections with other main beams (Fig. S7). Both purlins and beams use mortise and tenon joinery and were hardwood material. Wood 6"x6" timbers support the brick hearth in the dining room above. The wood timbers apparently replaced a brick arch that typically supports a hearth in houses constructed in this era (see Fig. S8). It is unclear why this replacement was made. The original chimney that would have risen above this hearth has been removed.



Figure S7



<u>Struble Engineering, LLC</u> Reading, Massachusetts

Figure S8

There was evidence of recent basement flooding on the debris material on the basement floor and damp conditions were present. The framing at the original section showed surficial signs of insect damage on many of the purlins and patches on the main beams (Fig. S7 & S9). The depth of this damage did not appear severe, but may require sistering with laminated veneer lumber (LVL) for any members that are found with deep damage. Severe insect damage was noticed at the 6"x6" wooden timbers supporting the brick hearth. The 6"x6" timbers will have to be replaced by steel lintel angles or the brick arch reconstructed due to the poor condition of the wood.





The main beam bordering the stair opening has been notched multiple times at its lower corner (possibly for some previous service) and has patches of insect damage along its length (seen in Fig. S9). Augmentation of the main beam will be required. It is relatively short and could be augmented with a single LVL of matching depth through-bolted to one face. Given the spans and the framing seen in the original section, it should be able

TTL Architects, LLC / Julie Larry Whitehead House – Building Condition Survey / Structural Systems June 28, 2006-revised

to support the 40 psf code-mandated residential live load plus allowance for 15 psf of dead load (55 psf total).

The entire width of the kitchen addition is spanned with full-cut 2"x10" dressed lumber of relatively clear hardwood at 16"o.c. The 2"x10"'s bear on sill plates atop concrete foundation walls (see Fig. S10).

The framing under the kitchen addition appears to be in good condition. Some spot leaks at the sills were evident. The resulting stains were found at the bearing ends. The bearing ends were notched at the bottom, approximately 1½"-2", to fit on the sill plates (see Fig. S11). Overall the framing appeared sound and dry. The framing can withstand approximately 80 psf total load, which is generous for residential loading by current code standards (40 psf live load). Deflection performance of this framing should meet current normal design standards.



Figure S10



Figure S11

C. Sills

Brickwork extending from the foundation wall to the underside of the floor planking along the perimeter of the original section of the house obscures the sill plates. The purlins and beams were pocketed into the brick walls (see Fig. S12). Viewed from the exterior, similar conditions were noted as brick atop the field stone extends up beyond the lowest clapboard. The lowest clapboards should be removed at a future date to allow for inspection of the sills.

The sills under the kitchen addition appear to be sound with only superficial wetness at spot locations (Fig. S11). They could not be observed from the outside. The sills may be rotted at the exterior and/or damaged from within by insects. This damage would not be detectable from the interior inspection. The lowest clapboards should be removed at a future date to allow for inspection of the sills.





D. Foundations

The foundation for the original section is comprised of mortared field stone overlaid with brick bearing walls that support the wood superstructure above (Fig S12). Viewed from the interior and exterior, it appears that there is an interior shelf of brick that begins at a lower elevation than the lowest brick wythe at the exterior, creating a thinner outward-facing wythe of field stone (compare Figures S12 and S13). The foundation walls appear to be in good condition. No bulging or shifting is evident. The basement floor is nearly obscured by debris. It appears to be a concrete slab and what could be seen of it was in fair condition.

The foundation for the kitchen addition is cast-in-place concrete walls, presumably on footings, that extends up to the sills under the first floor framing. The concrete walls abut

the original field stone walls (seen in Fig. S11) and a narrow opening in the original fieldstone foundation allows access to the basement of the kitchen addition. The condition of the concrete walls is good. Small vertical cracks were noticed that appear old and stable.



Figure S13

There is an approach slab-on-grade at the rear entrance. A bulkhead is located at the left side of this slab under a hinged wooden cover. The approach slab showed random cracking. The cracking has the potential to be exacerbated by freeze-thaw action during the upcoming winter months.

Description and Condition of Exterior Elements

A. Walls and Siding

The exterior of the house is clad in wood clapboards. Most appear to be in usable condition. The clapboards should be sealed from the elements with new paint or sealant. The wall flashing above the entry roof and below the second floor windows was installed incorrectly. The flashing was mistakenly installed on top of the asphalt shingles and should be installed beneath the roofing shingles.

B. Chimneys

The chimney for the furnace at the northeast corner of the original section is in good repair and appears to be of relatively recent construction. Given the relatively young age of the heating system and the hearth support noted in the framing description above, it appears as though the original chimney was abandoned and a new one lain up in the present location to exhaust the furnace burner.

Conclusions and Recommendations

Control of moisture in the basement should be made a priority. Control of moisture infiltration should begin with re-grading to lower the exterior grade around the sills. The re-grading will decrease insect accessibility and direct water runoff from the roofs away from the basement. In addition the lowest clapboards around the perimeter of the house should be removed to allow for inspection of the sills to determine if chemical treatments or replacement of the sills with treated lumber is necessary.

A comprehensive review of the structure for the Whitehead House will require further investigation. Elements not observed include: areas of the second floor framing, the kitchen addition roof framing, and exterior walls. Given the condition of what was observed, it is expected that undamaged framing of these components would satisfy current residential building code structural requirements. Repairs, in the form of reinforcement of the damaged/notched first floor framing, could be achieved by conventional methods and could be applied to any damaged components not yet uncovered.



SKETCH MAP Show property's location in relation to nearest cross streets and/or geographical features. Indicate <u>all</u> buildings between inventoried property and nearest intersection. <u>Indicate north</u>.



Recorded by Anne Grady

Organization Ipswich Historical Commission

Date November, 1983

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The building retains its original exterior finish and trim and is noteworthy for the simple, well-proportioned Greek Revival frontispiece with pilaster strip;, sidelights and broad frieze over the door. The story-and-one-third configuration without windows on the second level of the major facade is typical of Linetrook Greek Revival cottages. This is one of the best preserved.

HISTORICAL SIGNIFICANCE (Explain the role owners played in local or state history and how the building relates to the development of the communi y.)

The property was owned in 1910 by Small. It is now part of the Willowdale State Forest property.



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1910 atlas

APPENDIX D: FLOOR PLANS AND ELEVATIONS

HISTORIC CURATORSHIP PROGRAM REQUEST FOR PROPOSALS 2019 - WHITEHEAD HOUSE

EAST ELEVATION



NORTH ELEVATION







WEST ELEVATION





TTL-ARCHITECTS	WHITEHEAD HOUSE	N
28 DANFORTH STREET PORTLAND, ME 04101	WILLOWDALE STATE FOREST IPSWICH, MA	DWG: FLOOR PLANS SCALE: 1/8" = 1'-0" DATE: 28 JUNE 2006



SECOND FLOOR PLAN





APPENDIX E: PRESERVATION STANDARDS AND CRITERIA

HISTORIC CURATORSHIP PROGRAM REQUEST FOR PROPOSALS 2019 - WHITEHEAD HOUSE

APPENDIX -: Preservation Standards and Criteria

DCR requires that the exterior of the property be preserved in its existing architectural style. Interior space may be adaptively used, but remaining original detail is to be retained to the greatest extent possible. Preservation work and maintenance will be done by the Curator with plans, specifications and the work itself reviewed and approved by DCR, in consultation with the Massachusetts Historical Commission (MHC) and any other pertinent authority.

1. Historic Standards

The following general standards, as well as the *Secretary of the Interior's Standards for the Treatment of Historic Properties; 1992* (below) should govern the specific approach to preservation and use of the exterior and interior of the property:

a. Every reasonable attempt shall be made to provide for compatible uses that require minimal alterations.

b. The proposed uses of the property must maximize both immediate and long range preservation of the structure and its environment.

c. The distinguishing qualities and character of the property shall not be destroyed. Distinctive architectural and/or significant site features are not to be altered, and any historic material identified in the course of renovations is not to be removed from the building without the express approval of DCR.

d. All treatment that may affect surface or subsurface disturbances within the lease area must be evaluated by an archaeologist for potential effects to archaeological resources. If it is determined that an archaeological survey is necessary it should be conducted under permit from the state archaeologist at the Massachusetts Historical Commission in accordance with 950 CMR 70. Should artifacts be discovered in the course of the project, they should be investigated and recorded by an archaeologist permitted by the State Archaeologist, and turned over to the appropriate curatorial facility in accordance with Massachusetts General Laws, Chapter 9 Sec. 27c.

e. With regard to the interior of the property, DCR's preference is for historical fabric to be preserved. However, DCR is prepared to cooperate with a successful Proposer in developing an adaptive reuse program which insures the economic viability of the project while satisfying the Department's objective of preserving the property.

2. Construction Standards

DCR requires that all improvements to the property comply with the following codes and standards:

- a. Massachusetts State Building Code (most recent edition);
- b. State Plumbing Code;
- c. DEP Title V;
- d. Chapter 91;
- e. all other applicable state and local codes, laws and regulations

All work shall be reviewed and by DCR. All work to the building and plumbing system is subject to review and approval by the State Building and Plumbing Inspectors. Electrical work is subject to the review and approval of the local electrical inspector. Septic system work is regulated by the Department of Environmental Protection, in consultation with the local Board of Health. Fire protection, safety and projects that impact watershed resources fall under the authority of local officials.

Secretary of the Interior's Standards for the Treatment of Historic Properties

1. A property shall be used for its historic purpose or be placed in a new use that requires minimal change to the defining characteristics of the building and its site and environment.

2. The historic character of a property shall be retained and preserved. The removal of historic materials or alteration of features and spaces that characterize a property shall be avoided.

3. Each property shall be recognized as a physical record of its time, place, and use. Changes that create a false sense of historical development, such as adding conjectural features or architectural elements from other buildings, shall not be undertaken.

4. Most properties change over time; those changes that have acquired historic significance in their own right shall be retained and preserved.

5. Distinctive features, finishes, and construction techniques or examples of craftsmanship that characterize a property shall be preserved.

6. Deteriorated historic features shall be repaired rather than replaced. Where the severity of deterioration requires replacement of a distinctive feature, the new feature shall match the old in design, color, texture, and other visual qualities and, where possible, materials. Replacement of missing features shall be substantiated by documentary, physical, or pictorial evidence.

7. Chemical or physical treatments, such as sandblasting, that cause damage to historic materials shall not be used. The surface cleaning of structures, if appropriate, shall be undertaken using the gentlest means possible.

8. Significant archeological resources affected by a project shall be protected and preserved. If such resources must be disturbed, mitigation measures shall be undertaken.

9. New additions, exterior alterations, or related new construction shall not destroy historic materials that characterize the property. The new work shall be differentiated from the old and shall be compatible with the massing, size, scale, and architectural features to protect the historic integrity of the property and its environment.

10. New additions and adjacent or related new construction shall be undertaken in such a manner that if removed in the future, the essential form and integrity of the historic property and its environment would be unimpaired.

APPENDIX F: MAINTENANCE GUIDELINES

HISTORIC CURATORSHIP PROGRAM REQUEST FOR PROPOSALS 2019 - WHITEHEAD HOUSE



EXHIBIT F:

Guidelines for:

The Maintenance of Historic Properties

Including Recommendations for the Long Term Care of Historic Buildings and Landscapes

Commonwealth of Massachusetts Department of Conservation and Recreation Office of Cultural Resources

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FOREWORD

The Department of Conservation and Recreation (DCR), through the Office of Cultural Resources, has prepared the following:

STANDARDS FOR THE MAINTENANCE OF HISTORIC PROPERTIES

as a means to aid Curator/Tenants in the development of a long term maintenance plan for Historic Curatorship Program properties.

The purpose of these Maintenance Standards is to provide a means of evaluating the performance of the Curator/Tenant as well as to insure a high level of care and protection for these valuable historic resources.

The guidelines contained herein are meant to provide a broad-based philosophy of maintenance, applicable to all historic properties. However, the Department acknowledges that Curatorship properties vary in size and condition, with some properties requiring specialized attention to landscape and architectural details. Therefore, it is DCR's goal to work with each Curator/Tenant in setting annual priorities for individual properties in order to both preserve the character of the property and minimize future expenditures.

The Department intends to work cooperatively with the Curator/Tenant in overseeing the condition of the Curatorship property. The result of a well-developed maintenance plan will be the extended life of a historically significant property, lowered costs for the Curator/Tenant and the public benefit of a well-maintained, attractive property. The Department looks forward to working with Curator/Tenants towards the common goal of the preservation of the Commonwealth's historic properties.

PART I - BACKGROUND

A. Department of Conservation and Recreation

The Department of Conservation and Recreation (DCR) is an agency of the Commonwealth of Massachusetts. It is charged with overseeing and implementing a wide variety of statutory mandates relating to conservation and outdoor recreation. These include "control and supervision of such parks, forests and areas of recreational, scenic, or historic significance as may be from time to time committed to it." [Mass.General Laws, Ch. 21, §1]

B. Mission Statement

The mission of the Department of Conservation and Recreation is to exercise care and oversight of the natural, cultural and historic resources of the Commonwealth and to provide quality public recreation opportunities which are environmentally sound, affordable and accessible to all citizens.

To carry out its mission, DCR investigates, analyzes, promotes and demonstrates the wise stewardship of the Commonwealth's natural, cultural and historic resources; develops and maintains public access to such resources in the rural, suburban and urban areas of the Commonwealth; provides public recreation and education programs; and manages, protects and conserves all public lands, waters and facilities that have been entrusted to the care of the Department, for this and future generations.

C. The Massachusetts State Parks System

Beginning in 1898 with the establishment of Mt. Greylock State Reservation, the Commonwealth of Massachusetts has created an extensive system of State Parks and Forests. This system totals over 270,000 acres in over 160 distinct management units. It is under the control and supervision of the Department of Conservation and Recreation (DCR). Day to day management and operation of DCR properties is the responsibility of the Department's Division of State Parks.

D. Historic Curatorship Program

The Historic Curatorship Program, administered by DCR's Office of Cultural Resources, is a leasing program for historic properties located within the Massachusetts State Parks System. The primary goal of the Historic Curatorship Program is to obtain the rehabilitation and maintenance of historic state park properties in exchange for a long term lease.

PART II - METHODOLOGY

A. Purpose

The purpose of this document is to describe the maintenance requirements of the Historic Curatorship Program and to provide the Curator/Tenant with guidelines for the maintenance of historic properties in the Program.

The following guidelines are general maintenance standards required under a Curatorship lease. However, many Historic Curatorship Program properties include historic landscape elements which are character defining features of the property. In such cases, significant elements will be identified by DCR, and specific maintenance treatments will be developed with the Curator/Tenant.

B. Annual vs. Cyclical Property Maintenance

There are two categories of property maintenance: annual and cyclical. Since climate, weather conditions and other variables can affect the lifespan of materials, both annual and cyclical maintenance are essential to the proper upkeep of a historic building or landscape. Annual and cyclical maintenance can be defined as follows:

Annual maintenance is a regular, repeated action, usually performed every year and serves as a preventative measure. In a building, the cleaning of the roof gutters and downspouts would be examples of annual maintenance. In a landscape, mowing the lawn or raking leaves would be categorized as annual maintenance. A well-developed annual maintenance plan can extend the longevity of building materials, preventing costly future repairs.

Cyclical maintenance is a less frequent schedule of repair and replacement with a varied timetable, depending on the material in question. Installation of a new roof would be considered cyclical, since it occurs every 15 to 20 years. In a landscape, the rejuvenation of a plant bed or the resetting of stone steps is cyclical maintenance. Since cyclical maintenance can be more expensive than annual maintenance, Curator/Tenants should anticipate cyclical needs and plan accordingly. Appendix C of these guidelines lists the average lifespans for some common building materials.

C. Goals of Proper Maintenance

1. Benefits to the Curator/Tenant:

- a. Cost savings Annual and cyclic maintenance of a property can prevent more serious and costly deterioration.
- b. Visual Character If a property is regularly maintained it will look well-kept and attractive and inviting.
- c. Energy Efficiency Regular work on securing windows, doors and chimneys as well as placement of insulation insure tighter, more energy efficient buildings. Such efficiency results in annual cost savings for building heat as well as making the building more livable.
- d. Public Safety Regular and cyclical maintenance insures that buildings are kept up to current building codes and less likely to encourage fires, plumbing leaks and structural failures. Built forms within the landscape also need to be attended to in order to avoid structural failures, earth movement or other problems.
- e. Environmental Protection Failed septic systems, well contamination, underground fuel storage tank leaks, over use of pesticides and herbicides and other forms of environmental degradation can be avoided if tested, checked and/or inspected on a regular basis.
- 2. Benefits to the Commonwealth:
 - a. Compatibility with Public Open Space Over the years DCR has acquired land for public use and has maintained these properties to a high standard. A comprehensive maintenance plan for a Historic Curatorship property will enhance the appearance of the DCR facility and promote the goals of the facility management plan.
 - b. Preservation of Historically Significant Property -Almost all of the Historic Curatorship properties are eligible for nomination to the National Register of

Historic Places. Each property - building and landscape - is a significant physical reminder of the past. With proper maintenance they will be preserved for many generations to come.

c. Public benefit - Historic Curatorship properties will be open to the public at least twice each year, some more frequently. Regular maintenance of the property will add to the public enjoyment of the historic site.

PART III - MAINTENANCE STANDARDS

In order to keep the Historic Curatorship Program properties - both buildings and their settings - in good, operable condition, the following minimum standards shall apply:

A. Building Exteriors

Buildings shall be kept tight to the weather by installation of watertight roofing, protective paint coatings, proper drainage systems and other means by which water is prevented from penetrating into the building. Foundation plantings shall be pruned in order to prevent excessive moisture against the buildings.

B. Building Interior

Interiors shall be kept clean and dry. To the greatest extent possible, interior plaster and wood finishes shall be protected from insect infestation, condensation and water penetration.

C. Building Structure

Buildings shall be kept dry, structurally sound and in good repair. While under structural repair, buildings shall be stabilized and properly protected to prevent further damage to the building or to persons performing or observing the work in progress. All building repairs shall comply with all applicable state and/or local building codes. In the event repairs and/or restoration cannot occur immediately, the building shall be stabilized, in accordance with recognized preservation standards, in order to prevent further deterioration.

D. Building Systems

All building systems (plumbing, heating, air conditioning, electrical, smoke detector, fire suppression, security alarm systems and other building systems) shall be kept operable and in good repair and shall comply with applicable state and/or local building codes. The Curator/Tenant shall take every measure to prevent water leaks and resultant damage, electrical shocks or failure, and other similar damage that may result from the failure of a building system.

E. Grounds

The Curator/Tenant shall keep the grounds around the buildings in good condition. Grounds shall be free of litter or debris, clear of clutter and, generally, shall be kept neatly and attractively. The Historic Curatorship Program property shall be kept in accordance with the standards and goals established by the park or reservation management plan, including mowing schedules and historic landscape management. Where applicable, the Curator/Tenant shall maintain the landscaped areas of the property in accordance with recognized standards for maintenance of historically-significant landscapes. The Curator/Tenant shall exercise every effort to protect, stabilize and maintain significant landscape features for interpretation and/or restoration. Missing or deteriorated landscape elements will be replaced, in kind.

F. Environmental Hazards

All Historic Curatorship Program properties shall be kept free of environmental contaminants or hazards including, but not limited to, unregistered vehicles, unused/antiquated agricultural machinery or vehicles or parts thereof, automotive lubricants, hazardous and/or toxic materials, used tires, tree stumps, road salts and other potential contaminants to the ground. The Curator/Tenant shall keep all buildings free of destructive rodents and other animals or pests that may cause damage to the property. If applicable, the Curator/Tenant shall maintain a septic system in compliance with the State of Massachusetts Sanitary Code (Title V) and shall maintain a potable water supply in accordance with State and local standards.

G. Sanitation

Properties shall be kept clean and free of litter and debris. Trash and other wastes shall be removed on a regular basis. If the permitted uses of a property include the keeping of domestic or farm animals the Curator/Tenant shall remove animal wastes on a regular basis. The composting of organic wastes shall comply with all local health and safety regulations. Compost piles shall be located in areas approved by DCR.

H. Permitting

The Curator/Tenant will be responsible for obtaining all necessary permits and approvals for work on the Curatorship property. Special resources such as wetlands and archaeological sites contained within the Curatorship property will be identified.

PART IV - REVIEW & INSPECTION

A. Review

Cyclical maintenance of the Curatorship property may involve major changes to the building or landscape. Replacement of or significant repair to historic fabric, including landscape elements, will require DCR approval. In some cases, DCR will file a Project Notification Form (PNF) with the Massachusetts Historical Commission (MHC), as required under law. MHC must approve the project within 30 days in order for the work to proceed.

B. Inspection

Each year a DCR representative will inspect the property with the Curator/Tenant. Using the checklist found in Appendix A, the inspector will evaluate the condition of the property and the performance of the Curator/Tenant. A Curator/Tenant will be eligible for the credit if all of the requirements of the "Maintenance Services," as outlined in the Lease agreement, have been met.

The Curator/Tenant should inspect the property periodically to insure that the guidelines are being met prior to the annual inspection. From the ground, binoculars will make the inspection easier. The best time to observe the performance of the roof is during a moderate rain, when the drainage systems are in full use. The Quick Checks found in Appendix B will aid the Curator/Tenant in identifying areas which need attention. The checklists provided address general maintenance issues and should be customized to include special features or circumstances associated with a specific property.

PART V: APPENDICES

APPENDIX A: Annual Maintenance Inspection Checklist

Property Name: Date of Inspection: Value of Annual Maintenance Credit: Curator / Tenant(s) present: DCR Representative(s) present:

			I. BUILDING EXTERIOR
			A. Roof Structure and Materials
yes	no	n/a	
			1. Are there any missing, broken, or damaged roof slates or shingles?
			2. Are wooden shingles splitting and/or curling?
			3. Are slates cracked?
			4. Are there any signs of rusting?
			5. Are there any indications of standing water, water back-up or other water damage? (Example: damage from ice dams, damaged or missing gutters)
			6. Does any part of the roof sag or look out of alignment?
			7. Is there any damage to the cornice, soffits or fascia boards?
			8. Are there loose, rotten or missing gutters?
			9. Is the paint on the gutters peeling from the gutter?
			10. Do the gutters need to be cleaned and oiled with linseed oil?
			11. Do the downspouts need to be adjusted and connected with the gutter?
			12. Does the water from the downspouts need to be directed away from the house?
			13. Does the house need splash pads?
			14. Does the water collect near the foundation?
			Comments:
			B. Chimneys (from roof line up)
			1. Are the chimney flashings unsecured from either the roof or the chimney?
			2. Is the masonry cracked or crumbling?
			3. Are bricks and/or pargeting cracked or missing?
			4. Is the chimney leaning more than a few degrees?
			5. Is there bracing on the chimney?
			6. Are the chimneys in need of cleaning?
			Comments:
			C. Exterior Walls
			I. Are the walls warped or bulging?
			2. Are doors and windows misaligned with their frames or operating

				improperly?	
yes	no	n/a			
				3. Are there signs of settlement around the doors and windows?	
				4. Is the exterior siding placed on the building inproperly?	
				5. If wooden ext walls, does the exterior siding undulate, buckle or	
				curl?	
				6. If brick or masonry walls, are mortarjoints spalled, washed out or	
				broken?	
				Comments:	
				D. Exterior Woodwork	
				1. Is the woodwork less than 6"-8" from the ground?	
				2. Do probes into the wood indicate more than a 1/4 "penetration?	
				3. Is there any rotted or splitting wood?	
				4. Are there any signs of dirt (in the form of termite mud tunnels) on	
				foundations, steps and cellar walls?	
				5. Are there any signs of insect boring, such as holes, sawdust,	
				wood penetration, or other indicators?	
				6. Are vines and other vegetation located close to the house, thus	
				keeping moisture close to the house and inviting insect damage	
				and rot?	
				Comments:	
				E. Exterior Trim and Finishes	
				1. Are there any clapboards or sheathing materials missing from	
				the exterior?	
				2. Are there any loose, cracked or damaged clapboards or	
				sheathing materials?	
				3. Are sheathing materials improperly attached to the wall?	
				4. If aluminum, vinyl or asbestos siding is over the original	
				sheathing, is artificial siding cracking, buckling or splitting, etc.?	
				Does the siding prevent the building from breathing?	
				5. Is decorative woodwork improperly secured to the house?	
				6. Do decorative features, windows, door frames and other areas	
				need to be caulked and painted?	
				7. Is paint peeling, flaking or blistering? (If so, check for moisture in	
				the wails and presence of a vapor barrier)	
				8. Do any joint areas require caulking or flashing to prevent	
				moisture penetration	
				9. Does the surface contain mildew, chaiking or other paint surface	
				Comments.	
				F. Doors and Windows	
				I. Are doors and windows improperly fitted in their openings?	
				2. Is the glass cracked, loose or improperly glazed or painted?	
				3. Is there any rotted wood in the sills or lower rails?	
				4. Is weather stripping failing?	
				5. Are exterior storm windows and doors uninstalled?	

			6. If exterior storm windows are not feasible for historic or technical	
			reasons, are interior storm windows installed?	
yes	no	n/a		
			Comments:	
			G. Foundation and Masonry	
			1. Is water collecting at the foundation walls?	
			2. Is the foundation or masonry cracked or crumbling?	
			3. Are bricks, stone and/or parging cracked or missing?	
			4. Is the mortar eroding or loosening?	
			5. Are there serious signs of building settlement (ie., more than	
			hairline cracks in the masonry)?	
			6. Is there spalling, cracking or crumbling of stone trim? (Example:	
			if there is brownstone, is it flaking?)	
			7. Are there any signs (bulges, cracks, etc.) of separation of brick	
			courses?	
			Comments:	
			II. BUILDING INTERIOR	
			A. Cellar/Basement	
			 Is the basement inadequately ventilated? 	
			2. Does the basement small damp and moldy?	
			3. Do sills or joists show signs or termite or insect damage? (Probe	
			wood to determine extent of damage)	
			4. Are there any signs of building sagging or deflection? (If so,	
			check for weakened support posts, rotten beams, etc.)	
			5. Are there any signs (wood dust, holes, active insects) of	
			weakened or damaged floor joists or beams, flooring or other	
			wooden members?	
			6. Are there indications of leaking pipes — water pipes, pumps or	
			wells, waste pipe failure, etc.?	
			7. Is there any flooding in the basement?	
			8. Is the bulkhead unsecured or improperly flashed and caulked?	
			9. If there is a crawl space, is it opening and allowing moisture to	
			enter the house?	
			10. Is the foundation mortar separating from the masonry	
			foundation or cracking?	
			Comments:	
			B. Finished Spaces	
			1. Are there any signs of damp plaster on ceilings, walls, around	
			chimneys, under kitchen or bathrooms, or in other applicable	
			locations?	
			2. Is there any vibration or "bounce" to the staircase or other floor	
			area of the house, indicating potential structural problems?	
			3. Do floors sag or vibrate when there is a lot of foot traffic or	
			jumping?	
			4. Are there prominent cracks in walls, floors or near window or	

			door casings which indicate settlement?	
yes	no	n/a		
			5. Are these cracks old or recently created?	
			Comments:	
			C. Insulation and Ventilation	
			1. Are the exterior walls uninsulated? If not, what insulating material	
			is used, and was a vapor barrier installed?	
			2. Is attic insulation improperly installed?	
			3. Does the attic insulation restrict adequate ventilation?	
			Comments:	
			D. Attic	
			1. Are there any signs of leaks (staining) on the attic rafters or	
			sheathing?	
			2. Is the attic improperly ventilated, causing moisture and mildew to	
			collect on the underside of the roof?	
			3. Are there any sagging rafters, broken collar ties or other	
			structural deficiencies?	
			4. Are the chimney bricks in the attic loose or in bad condition?	
			5. Are there any holes in the chimney or indication that there is a	
			failure of the present chimney flue to contain the heat generated	
			from the heating system and/or fireplaces?	
			6. Is there any evidence of insect infestation (sawdust, borings,	
			etc.) in wooden members (rafters, purlins or sheathing)?	
			Comments:	
			III. BUILDING SYSTEMS	
			A. Water Systems and Plumbing	
<u> Ц</u>			1. Is water pressure inadequate?	
			2. If a private well, is the pump malfunctioning?	
			3. If a private well are there any issues with the drinking water	
			quality?	
			 4. Are there any leaks in the water lines?	
			5. Are the kitchen and bathroom fixtures improperly installed,	
			 causing leaks, "sweating, or other water damage?	
			Comments:	
			D. Lippting System	
		<u> </u>	 B. Frequing System 1 to the besting system molfunctioning? 	
		$ \square $	I. Is the heating system mairunctioning?	
			Sewage/Septic Systems	
			1. Are there odors emanating from the septic tank/field or sewage	
		<u> </u>	life area?	
			2. If a septic system, are there any depressions or "wet spots" in	
<u> </u>			the ground area adjacent to or within the septic field?	
			3. Does the septic tank need pumping?	

			Comments:	
ves	no	n/a		
			D. Natural Gas Systems	
			1. Are there any natural gas/propane odors emanating from the system?	
			2. If a propane tank is located on the property, is it improperly secured?	
			Comments:	
			E. Electrical Systems	
			1. Are overhead electrical lines coming into the property	
			disconnected or uncovered?	
			2. Are poles supporting the wires too close to tree limbs and other encumbrances?	
			3. Does the present amperage violate the Mass. Building Code and/or local building code?	
			4. Have any major electrical appliances been added to the system within the last year?	
			5. Do any lights or electrical utilities fail when turned on?	
			6. Do bathroom, laundry room and kitchen electrical systems need ground fault outlets?	
			7. Beyond regional electric systems failures, have there been any electrical failures, "black outs", or other problems system within the last year?	
			8. Are any electrical lines located close to water sources?	
			9. Are any outside electrical plugs and lights exposed to weather damage?	
			Comments:	
			F. Telephone/Cable System	
			1. Are the overhead telephone lines coming into the property loose or disconnected?	
			2. Are poles supporting the wires too close to tree limbs or other encumbrances?	
			Comments:	
	1		G. Fire/Security Systems	
			I. If there is a fire suppression system, is it due for an annual check	
			up?	
			2. If there is a home security system, is it due for an annual check up?	
			Comments:	
			IV. WALKWAY AND DRIVEWAY MAINTENANCE	
			1. Are the walks and driveway surfaces in bad condition, with any uneven or cracked surfaces?	
			2. If gravel, stone or brick paths, are any materials missing and is infill material needed to supplement existing way?	

				3. If an asphalt material, does surface need a seal coat?	
				Comments:	
yes	no	n/a			
				V. MISCELLANEOUS PROVISIONS	
				I. Are there any systems and/or property features that warrant	
				special maintenance considerations and/or unique treatment? If so,	
				what are they and what special provisions need to be made?	
				2. Are trash containers securely covered to prevent animals from	
				getting in?	
				3. Are trash containers left in the street after trash pickup?	
				4. Where waste collection is not available, is no more than two	
				weeks worth of waste collected located on the site?	
				5. Are recycling materials uncovered?	
				6. Is more than a month's worth of recycled materials located on	
				the site?	
				7. Are ladders, building materials and other construction-related	
				equipment properly secured to limit theft and insurance liability?	
				8. Are boats, mobile homes, trailers, recreational vehicles, etc., in	
				plain view?	
				9. Is the yard littered with children's toys, bicycles, plant pots,	
				garden tools, barbecue grill and other items?	
				10. Is the outside laundry line screened in plain view?	
				Comments:	
				VI. COMPLIANCE AND COMPATIBILITY	
				1 Is the overall appearance of the Curatorship site incompatible	
				with the conservation and recreation goals of DCR as well as with	
				those of the facility management plan?	
				2 Has the Curator/Tenant failed to comply with the reporting	
				requirements of the lease agreement?	
				Comments:	
			1	VII. REMINDERS	
				1. Are there any unpaid taxes on the property?	
				2. Is the insurance coverage inadequate or out of date?	
				3. Do we need a copy for the file?	
				4. Are any utility services out of date?	
				comments:	

APPENDIX B: Annual Building and Landscape Quick Checks

3 MONTH INSPECTION

- [] Inspect yard to see that it is properly maintained/picked up
- [] Check foundation plantings for moisture retention
- [] Check roof for debris
- [] Clean downspouts and gutters. Oil gutters
- [] Check fuse box for proper operation and amperage of fuses
- [] Inspection of yard
- [] Mow lawn regularly (April-November)
- [] Weed/water lawn and planting beds (April-November)
- [] Mulch (seasonal)
- [] Check irrigation systems

6 MONTH INSPECTION

- [] Inspect foundation for movement, spalling or other damage
- [] Inspect and treat for insect damage and/or nests
- [] Check for any structural deficiencies in wooden members
- [] Inspect joint areas for caulking and flashing
- [] Check condition of exterior paint
- [] Check condition and energy efficiency of doors, windows and bulkhead
- [] Check gas/propane system for leaks and proper connection to structure
- [] Inspect electrical lines to determine if they are free of obstructions
- [] Inspect interior electrical systems for proper operation
- [] Test fire suppression system for proper operation
- [] Test security alarm system for proper operation
- [] Apply fertilizers, lime and herbicides to lawns and plants (as needed)
- [] Apply soil nutrients (as needed)
- [] Rake leaves, general yard clean up (seasonal)
- [] Aerate Lawn
- [] Replace plant materials (spring and fall for trees and shrubs)
- [] Prune trees and shrubs (spring and fall)
- [] Clear paths and trails
- [] Mow meadow (once per year or as needed)
- [] Spray fruit trees
- [] Divide perennials

9 MONTH INSPECTION

- [] Check exterior walls for bulges, settlement, and curling clapboards
- [] Check condition of exterior woodwork (trim, cornerboards, posts, ballustrades)
- [] Review plumbing system for leaks, "sweating" and general operation
- [] Inspect telephone lines to determine if they are free of obstructions
- [] Protect garden furnishings (paint as needed)
- [] Inspect driveway and drainage systems

12 MONTH INSPECTION

- [] Inspect roof for leaks, shingle/slate coverage, structural changes, proper ventilation
- [] Clean heating system (ducts and vents)
- [] Inspect and clean himney
- [] Check insulation materials and vapor barriers

- [] [] [] [] []
- Inspect septic system for proper operation and/or pumping Inspect driveways and walkways Test private well water per State and Local regulations Test soils for Ph and other factors (add supplements as needed)
- Clean drainage structures
- Repoint masonry on garden structures (as needed)

Cyclical Building and Landscape Milestones

2-5 YEAR TASKS

- Apply fungicide treatment to wooden roof shingles. []
- Check roof air circulation []
- [] Repair windows and doors for damage and energy efficiency
- Check and clear property storm drainage system []
- Install basement vapor barrier (as needed) []
- [] Add insulation to walls, basement ceiling and attic (as needed)
- Check house for proper ventilation basement, attic and living area []
- Pump septic system (every two years or more as necessary) []
- Replace/supplement path materials []
- Drain and clean ornamental pool []
- [] Remove invasive plant material from natural pond
- Stabilize stone walls []
- [] Stabilize garden structures
- Replace lawnmower blades Π

5-10 YEAR TASKS

[]

- Repoint chimneys and foundations, add related flashings (as needed)
- Paint interior walls, trim and ceilings []
- Paint exterior siding, trim and windows []
- Replace gas meter (every 7 years) []
- Replace hot water tank (every 5-10 years) []
- Rejuvenate plant beds (as needed) []
- Replace/stabilize driveway materials Π

11-15 YEAR TASKS

- Replace linoleum and similar flooring materials Π
- Refinish wood floors (as needed) []
- [] Repair or replace private well pump
- [] Replace gas dryer
- [] Replace propane tank
- Replace/repair garden water system []
- Π Replace/Repair wooden fencing and posts

16-20 YEAR TASKS

- Replace roofing materials and wooden sheathing as necessary
- [] Replace synthetic (vinyl, aluminum, etc.) as needed []
- [] Replant lawn area (as needed)

21-30 YEAR TASKS

- Replace wooden clapboard, trim and/or decorative elements (as needed) []
- [] Repoint masonry (as needed)
- [] Repair cracks from structural settlement (as needed)
- [] Replace gas boiler
- [] Replace gas or electric stove
- [] Replace water lines to property

APPENDIX C: Average Lifespan of Some Common Building Materials

I.BUILDING EXTERIOR

60-80 year
20-30 years
20-30 years

B. Chimneys

Brick/Stone	
Clapboard or Metal cover	
Clay Flue Liner	75 years

C. Masonry Foundation......10 years (repoint)

D. Exterior Walls	
Wooden Clapboard	25 years
Wooden Shingles	40 years
Paint	5-7 years
Brick, stone, concrete block	25 years (repoint)
Synthetic siding (aluminum, vinyl)	20-30 years

E. Exterior Woodwork.....Indefinitely (with proper maintenance)

II.BUILDING INTERIOR

A. Finishes	
Paint, varnish and wallpaper	7-10 years
Wood Flooring	5-10 years (refinish)
Linoleum	.10-15 years

B. Building Systems

1. Plumbing	
Lead pipes	replace immediately
water meter	
well pump	
fixtures	varies
septic	pump every 5 years

2. Heating system

Gas meter	7 years
Boiler	
Hot Water Tank	5-10 years
Dryer	
Oil Tank	
3 Electrical System	50 years

<u>ა</u> .	Electrical	System	<u>.</u>	 	ou years
pul	I cords			 	5 years

switch plates and outlets	.15 years
lighting fixtures	.20 years
electric heat pump	.20-25 years (repair @ 10 yrs)
baseboard wiring	.2-5 years (repair)

<u>4. Telephone Cable</u>......50 years (repair @ 10 yrs)

5. Insulation (Check for settlement)2 years

6. Life Safety Systems	
Smoke detectors	15 years
Home Security System(repair)	10 years

APPENDIX B: REHABILITATION COST ESTIMATES

HISTORIC CURATORSHIP PROGRAM REQUEST FOR PROPOSALS 2019 - WHITEHEAD HOUSE