



Resident Curator Program

Request for Proposals for the
Restoration, Adaptive Reuse and Maintenance of the
Smith-Curtiss House
Osbornedale State Park, Derby, CT 06418



State of Connecticut

Department of Environmental Protection

Division of State Parks and Public Outreach

79 Elm Street, Hartford, CT 06106

www.ct.gov/dep



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PART I – RESIDENT CURATOR PROGRAM OVERVIEW

The Connecticut State Park System includes a number of historically significant buildings which are currently vacant or underutilized. They are part of the state's cultural heritage. These houses, cottages and outbuildings, without available state funds to care for them, are falling prey to the elements and vandalism. The Connecticut Department of Environmental Protection (DEP), through a competitive proposal process, seeks to enter into a long term lease with a Resident Curator who will pay rent in the form of services, specifically the restoration, adaptive reuse and maintenance of the designated property. The reuse of these historically significant properties must be compatible with the surrounding community while enhancing the visitor's experience of the public park.

A resident curator is a private individual, a private not-for-profit (501c3) organization or a for profit company who is interested in historic preservation, who wishes to live in or adaptively reuse a historic house on state park or forest land. A resident curator should have the skills, knowledge, interest and financial means to restore a historic building and be willing to share it with the public.

The intent of the Resident Curator Program is to rehabilitate and maintain historic state park and forest properties at no expense to Connecticut taxpayers. The program creates a partnership between DEP and a resident curator whereby the restoration, adaptive reuse and ongoing maintenance of the property are performed within guidelines set forth under this program. Resident curators with the skills to apply sweat equity toward the property improvements will be able to leverage their abilities to reduce rehabilitation costs. In lieu of rent, the CT DEP will calculate the value of the lease for the Resident Curator Program by establishing a Fair Market Rent for the lease term. A management allowance of 10% of the rehab cost for and a 20% allowance for daily and routine maintenance will be added to the Fair Market Rent calculation. Please note that at the expiration of the lease, the property reverts to the State of Connecticut at no cost to the state.

The resident curator is required to open their properties to public use once a year and may propose a variety of ways in which to offer that service. Historic house tours, garden tours, bird or wildlife viewing, art classes, participation in the Great Park Pursuit, and astronomy nights are just some of the ways in which a resident curator could open their property to the public. Thus, the partnership benefits the public, the state, and the resident curator.

DEP is interested in a hearing from a wide range of proposers. Adaptive reuses of the property may involve either for-profit or non-profit undertakings or a combination of both. The reuse proposal must be consistent with the guidelines of this RFP and be compatible with the DEP's mission of environmental conservation, historic preservation and public recreation.

Founded in 1971, the mission of the Department of Environmental Protection is to conserve, improve and protect the natural resources and environment of the State of Connecticut

in such a manner as to encourage the social and economic development of Connecticut while preserving the natural environment and the life forms it supports in a delicate, interrelated and complex balance, to the end that the state may fulfill its responsibility as trustee of the environment for present and future generations.

The Connecticut Division of State Parks maintains and operates nearly 300,000 acres of public recreation lands including 107 state park and 32 state forest recreation areas throughout Connecticut. The system includes 14 campgrounds, 19 beaches, hundreds of miles of trails, environmental education centers, 11 museums and numerous historic sites. Many of the properties identified for the Resident Curator Program are houses that are within state parks that presently have no identified park use, but are integral to the park property.

PART II – PROPERTY INFORMATION

Smith-Curtiss House, Osbornedale State Park, Derby, CT 06418

A.



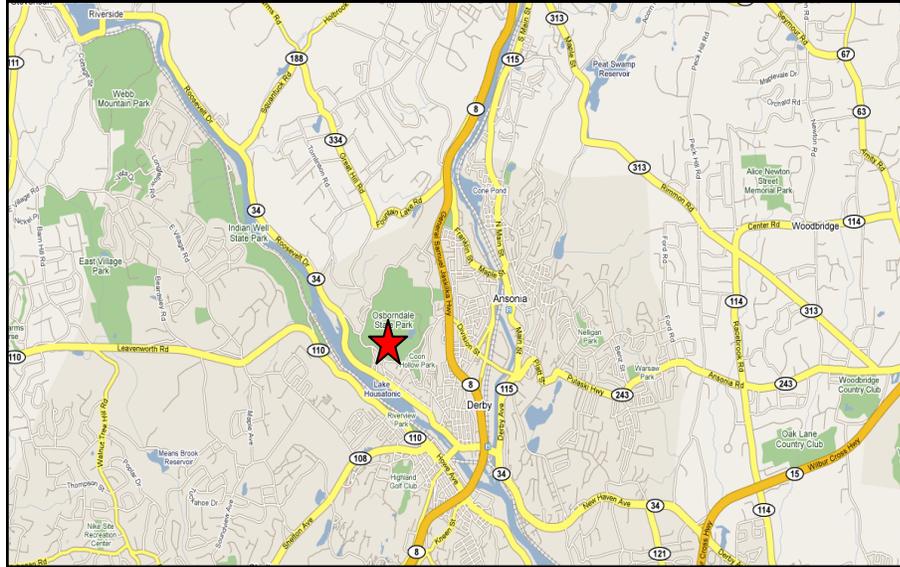
B. Historical Significance of Property & Buildings

The property is listed on the State Register of Historic Places, but is not yet on the National Register of Historic Places. It is thought to be one of the oldest houses in Derby. The house and property were purchased by Frances Osborne Kellogg as part of her large dairy farm and on-going land conservation efforts. It was donated to the State of Connecticut upon her death in 1956 to be part of Osbornedale State Park.

C. Location with Map

The Smith-Curtiss House is located in the Osbornedale Management Unit in the town of Derby, New Haven County, Connecticut. Derby is a small city with a population of 12,391 at the 2000 census. With 5 square miles of land area, Derby is Connecticut's smallest municipality.

Derby was settled in 1642 as a Native American trading post under the name Paugasset. It was named after Derby, England in 1675. In the 19th century, both corsets and hoop skirts were manufactured in the city. There are six National Register of Historic Places sites in the town of Derby.



D. Curtilage

The area of property included in the lease will be approximately 1.4 acres including the house, two-bay garage, and a private driveway. Please see Appendix H for a survey map of the curtilage area.

E. Site Description

The site includes a center chimney colonial saltbox house and a detached two-bay garage. The property is a portion of Osbornedale State Park but has direct access to Hawthorne Avenue. In 1956, Osbornedale State Park was willed to the people of Connecticut by Frances Osborne Kellogg, granddaughter of John W. Osborne, one of the Naugatuck Valley's early industrial entrepreneurs. By adhering to the belief that one should always buy land but never sell it, Mrs. Kellogg gradually acquired the numerous separate farms which now comprise the 411-acre Osbornedale State Park.

Today, the Park offers hiking, picnicking, fishing, bird-watching, and ice skating. Also included in the Park are the Kellogg Environmental Center and the Osborne Homestead Museum. The main public entrance to the Park is approximately .8 miles away from the house site.

There is currently no active Friends group associated with the Park. The Osborne Homestead Museum is a member of the Connecticut Historic Gardens Club.

F. Description of Building

The center portion of the house was built between 1740 and 1780, with additions in mid-19th century and early 20th century. The house is approximately 2,302 square feet.

Located on the ground level are the kitchen, the keeping room, south parlor, north parlor, and a full bathroom. On the second floor are three bedrooms and access to an unfinished attic. On the ground floor there is access to a crawl space and the poured concrete floored, stone lined cellar with a gas burning, forced hot air furnace.

The house is on both city water and city sewer. The electrical system was in working order in April 2010, but is not to code. The house was last occupied by a State of Connecticut employee in 2000.

The roof was replaced on the house in the fall of 2008. At the same time, weatherproof Tyvek was adhered to the exterior north elevation to prevent moisture from entering the structure.

G. Access to the Building

The house is located approximately .5 miles from CT Route-34, 1.8 miles from CT Route-8, and 14.5 miles from Interstate-95. The House is accessed from a private driveway off Hawthorne Avenue. Parking is located between the house and garage.

H. Development Issues

Hazardous Materials

- a) The exterior and interior surfaces are coated with lead paint.
- b) There is evidence of asbestos.
- c) There is not an underground oil tank.

Access Issues

There are no access issues as the house has direct access from Hawthorne Avenue. The Resident Curator would be responsible for plowing the driveway.

Natural Issues

- a) Wetlands nearby: Pond is approx. 350 feet to the northwest.
- b) Flooding: No
- c) Erosion: No
- d) Hazardous Trees: unknown

I. Lease Term

The maximum lease term that the DEP will enter into would be a 20 year lease with the option to extend for one 5 year increment. Proposers may suggest an alternate lease term.

The Smith Curtiss House requires a substantial amount of restoration. In lieu of rent, the CT DEP will calculate the value of the lease for the Resident Curator Program by establishing a Fair Market Rent for the lease term. A management allowance of 10% of the rehab cost for and a 20% allowance for daily and routine maintenance will be added to the Fair Market Rent calculation. Please note that at the expiration of the lease, the property reverts to the State of Connecticut at no cost to the state.

Rehab cost estimates:	\$848,627
10% (management allowance)	\$ 84,862
20% (maintenance allowance)	<u>\$169,724</u>
Fair Market Rent	\$1,103,213

\$1,103,213 over a 25 year lease term = \$44,129 / year = \$3677/ month

J. Open House

There will be two open house opportunities for the Smith-Curtiss House:

Friday, October 29, 2010 from 2:00pm to 5:30pm

Saturday, November 20, 2010 from 9:00am to 1:00pm

K. Directions

From I-95 South: Take exit 47 (Route-34 connector). Stay on connector until it ends; proceed straight until road ends at the junction with Ella Grasso Boulevard. Take a right onto the Boulevard and move quickly to the left lane. At the first intersection, take a left onto Route-34 and continue west on Route-34 (approximately 5 miles). Follow signs for Route-34 West. Take a right onto Lakeview Terrace (there is a road sign for Kellogg Environmental Center/Osbornedale State Park at the corner). Continue to stop sign at the end of the road. Turn right at stop sign onto Hawthorne Avenue. House is approximately 500 feet on the left.

From I-95 North: Take exit 27 to Route-8 North. From Route-8, take exit 15. At end of ramp, turn left onto Route-34. Take a right onto Lakeview Terrace (there is a road sign for Kellogg Environmental Center/Osbornedale State Park at the corner). Continue to stop sign at the end of the road. Turn right at stop sign onto Hawthorne Avenue. House is approximately 500 feet on the left.

From Route- 8 North or South: Take exit 15. At end of ramp, turn left onto Main St. (Route-34). Take a right onto Lakeview Terrace (there is a road sign for Kellogg Environmental Center/Osbornedale State Park at the corner). Continue to stop sign at the end of the road. Turn right at stop sign onto Hawthorne Avenue. House is approximately 500 feet on the left.

PART III – CURATORSHIP REQUIREMENTS

A. General Resident Curator Requirements

1. The State of Connecticut considers leasing historic properties through the Resident Curator Program primarily as a means to facilitate their long-term preservation. Historic properties may be leased only if the following adaptive reuse conditions are met:
 - a. The proposed use(s) are compatible with the mission of the Department of Environmental Protection and will ensure the preservation of the historic resource;
 - b. The proposed use(s) do not add to the DEP's management responsibilities for the park;
 - c. The proposed use(s) are compatible with the public's enjoyment of the resource;
 - d. The proposed improvements are compatible with the historic quality and significance of the resource;
 - e. The proposal for reuse is formulated to provide a public benefit to the citizens of the State of Connecticut;
 - f. The proposed improvements are carried out by persons with sufficient qualifications and/or appropriate licensure;
 - g. The proposed improvements will thoroughly consider the use of environmentally sustainable products and practices in the rehabilitation, management, and maintenance of the property. (Please see Appendix E)

2. The State of Connecticut intends that, under the lease, the Resident Curator shall have the sole responsibility for:
 - a. Rehabilitating and maintaining the property as a significant historic resource in conformance with the preservation and construction standards outlined in Appendices D and F 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;
 - b. Occupying and maintaining the property in compliance with the Lease and any other conveyances or contractual instruments, and all applicable permits, federal, state, and local laws, regulations, and the like;
 - c. Defraying any and all costs associated with the capital improvements, repairs, and maintenance of the property in conformance with the Lease and any other conveyances or contractual instruments;
 - d. Paying all local and state taxes or fees which may be associated with the property for the duration of the Lease;
 - e. Maintaining in full force sufficient insurance to cover costs of rehabilitating any partial damage or destruction of the property;
 - f. Maintaining comprehensive liability insurance for all activities on the property;

- g. Acquisition of and compliance with all state and local permits for the rehabilitation of the structure including, but not limited to, a Certificate of Occupancy from the local Buildings Inspector;
- h. The Resident Curator will be responsible for all regular and routine maintenance including but not limited to those tasks outlined in Appendix G. This includes the entire structure as well as the surrounding area included in the Lease;
- i. The Resident Curator shall be required to provide a public benefit. The successful candidate will identify an on-going program which ensures public access to the property at least once annually;
- j. Indemnifying the State of Connecticut against all claims or suit brought as a result of an error or an act of omission by the Resident Curator;
- k. Complete a photo documentation of the restoration process.

B. Review and Inspection

- 1. The DEP reserves the right to inspect any and all work performed under the Resident Curatorship. The State Building Inspector must review and approve all work to the building including plumbing, electrical work, health and safety issues, and fire protection. The Resident Curator is also responsible for all compliance with all state, local, or federal regulations, including the Natural Heritage and Endangered Species Program, local Conservation Commissions, and Historical Commissions.
- 2. The Resident Curator will submit to the DEP an annual report including a summary of all work on the building(s) and property, photographic documentation, permits applied for and received, and a summary of the work that will be commenced the following year.
- 3. An annual inspection of the property will be conducted by members of the DEP Review Team.

PART IV – PROPOSAL SUBMISSION

Instructions for the Preparation and Submission of Proposals

1. Instructions

a. General

Five (5) copies (one unbound) of the Proposal must be enclosed in a sealed envelope and submitted to DEP before **Monday, December 13, 2010 at 4:00pm**. 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:

RESIDENT CURATOR PROPOSAL
Smith-Curtiss House
Osbornedale State Park, Derby, Connecticut

Proposals should be submitted to the following address:

Department of Environmental Protection
State Parks & Public Outreach Division
79 Elm Street – 6th Floor
Hartford, Connecticut 06106

Attn: Nicole Chalfant Shaw, Resident 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. Electronic copies of proposals are encouraged in addition to the required hard copies. These may be emailed if under 5 MB or submitted on disk or other standard electronic media.

Proposers are requested to examine this Request for Proposals and the accompanying checklist to make sure that all pages are included. DEP assumes no responsibility for a proposal submitted as an incomplete Request for Proposals package.

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

This Request does not commit the State of Connecticut 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.

The Review Committee may conduct interviews to determine the best possible candidate for the Resident Curatorship.

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

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

Nicole Chalfant Shaw, Resident Curator Program Manager
Department of Environmental Protection
State Parks & Public Outreach Division
79 Elm Street – 6th Floor
Hartford, Connecticut 06106
Tel: 860-424-3179
FAX: 860-424-4070
Email: nicole.shaw@ct.gov

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 DEP to be necessary to Proposers in their preparation and submission of Proposals, or prejudicial to uninformed Proposers if they were to lack such information.

Proposers are encouraged to thoroughly and carefully examine the subject property and may, at their own expense, have architectural, engineering, tradesmen, or other professionals analyze the building conditions assessment. As with any building of age, the DEP does not warrant that all building conditions are known and detailed in the building conditions assessment.

Proposals should follow the outline and supply all of the information described in the application and should demonstrate the ability of the potential Curator to undertake a challenging and complex assignment. Proposals should be persuasive as to their feasibility and should reflect an understanding of the historic qualities of the property and their value. It is intended that the substance of a Proposal, as approved by the State, will be incorporated into all agreements and real property transactions which may result from the process.

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 fourteen sections. If the proposer chooses the latter option, please provide responses in a similar format, under the same section headings.

PART V – PROPOSAL EVALUATION & SELECTION PROCEDURE

A. Evaluation Team

The DEP has convened an Evaluation Team composing staff and other individuals whose interest or expertise qualifies them to review the proposals. This Evaluation Team will review all submissions from proposers and make appropriate recommendations. 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:

1. Compatibility with the mission of the Department of Environmental Protection
2. Quality of complete proposal
3. Financial ability to complete proposed work
4. Demonstrated experience in restoration/rehabilitation/historic preservation
5. Adherence to historic preservation standards
6. Scope and nature of the public benefit to the State
7. Inclusion of sustainable building practices
8. Consideration of accessibility issues
9. Financial contribution to the property

C. Steps in Resident Curator Proposal and Selection Process

1. Open House

The DEP will hold at least one open house at the property for all interested potential proposers. (See Part II, Section J) All prospective proposers are strongly encouraged to attend the open house.

2. Review of Proposals

A staff review and analysis of all proposals will commence based on the evaluation criteria described in this Request for Proposals. During this process, DEP may terminate further consideration of any proposal at its own discretion; it may also request the proposer submit additional information.

3. Interviews/Presentations of Proposals

DEP anticipates that it will invite select proposers to discuss their proposals in person prior to making a final decision.

4. Proposal Selection

Upon completion of DEP's review of all accepted proposals, the Evaluation Team will make a final decision. DEP reserves the right to request further information from a proposer prior to final selection. DEP reserves the right to waive any formalities.

5. Provisional Resident Curator Designation

DEP anticipates that within 60 days of the conclusion of the interview phase, the Department will designate a Resident Curator for the property. All proposers will be notified in writing of this Resident Curator designation.

6. Execution of Lease

The execution of a lease for the property will follow the satisfactory completion, in order, of each of the following milestones:

- a. Mutual agreement between the DEP and the Designated Curator on the terms of the proposed disposition;
- b. Completion of 120-day notice period of the Department's intention to lease. [This period may be reduced to 60 days if DEP receives the required waivers from pertinent officials.] It shall be understood by Proposers that they will have no legal recourse against the State of Connecticut, DEP, SHPO, or their respective employees, officers, members, or agents for any damages, loss of opportunity or costs incurred in the preparation of their Proposal or in the negotiation process in the event that a lease for the property is not executed, regardless of the reason. All decisions made by the State are final and binding upon each entity submitting a proposal, its agents, employees and assigns.

At this time, the Resident Curator will be required to meet with all applicable state and local inspectional authorities and DEP staff to discuss permitting and regulatory issues. The Resident Curator will be allowed to work on the building following the execution of the lease.

PART VI – RESERVATIONS & CONDITIONS

A. General Reservations

1. The DEP 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 (RFP), including information that is available upon request. The information provided is subject to errors, omissions, change of cost, lease or conditions, additional changes in and different interpretations of laws and regulations prior to sale, lease, or financing.
2. The DEP reserves the right to suspend, withdraw, or amend the RFP at any time, without notice.
3. The DEP 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. The DEP reserves the right to change the selection process or schedule with written notice to all respondents to the RFP or finalists, as necessary.
5. The DEP reserves the right to reject, at its sole discretion, any proposal not submitted in conformance with the RFP and any amendments hereto, or to reject any and all proposals in its sole discretion, for any reason. The DEP further reserves the right to waive or decline to waive irregularities in any proposal when it determines that it is in DEP's best interest to do so.
6. The DEP reserves the right to negotiate the term of the lease with the Designated Curator prior to entering into a lease. If a lease is not executed with the Designated Curator, DEP may choose to execute a lease with an alternate Resident Curator from the pool of respondents, to terminate the selection process, or to begin a new selection process.

B. Conflict of Interest and Collusion

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

C. Confidentiality

1. Respondents should assume that all material submitted in response to this RFP will be open to the public, with the exception of the Respondents personal financial information which DEP will endeavor to keep confidential. Please see disclaimer at on the proposal.
2. The DEP reserves the right to share any and all ideas from any of the proposals submitted with the selected Resident Curator. No Respondent has proprietary rights to any ideas or materials submitted in response to this RFP. All materials submitted become the sole property of the State of Connecticut.

D. Proposer's Responsibilities

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

E. Lead Disclaimer

Lead is a toxic metal that was used for many years in products found in and around our homes. Lead also can be emitted into the air from motor vehicles and industrial sources, and lead can enter drinking water from plumbing materials. Lead may cause a range of health effects, from behavioral problems and learning disabilities, to seizures and death. Children six years old and under are most at risk. Beginning April 22, 2010, federal law requires that contractors performing renovation, repair and painting projects that disturb more than six square feet of paint in homes, child care facilities, and schools built before 1978 must be certified and trained to follow specific work practices to prevent lead contamination. For more information, please visit: www.epa.gov/lead/

F. Other Legal Issues

1. Conflict of Interest

- a. DEP employees are not eligible to participate in the Resident Curator Program.
- b. Employees of the State of Connecticut may participate in the Resident Curator Program.

2. Miscellaneous Provisions

The Department's sole 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, DEP reserves the right to terminate the lease. Additionally, in the event of a default by a Resident Curator, DEP 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) Resident Curator bankruptcy.

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APPENDIX A – PHOTOGRAPHS



South and West elevations looking northeast



North elevation looking southwest



Detached Garage - south and west elevations looking northeast



East elevation looking west



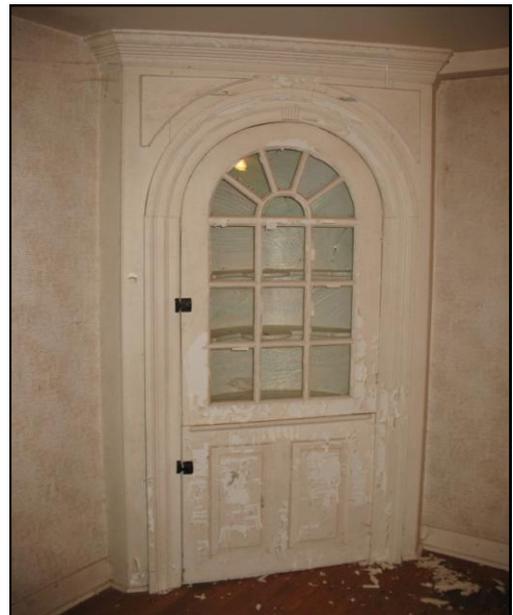
Front Hall looking south



North Parlor looking northeast



South Parlor looking west



South Parlor Cupboard
looking southeast



Keeping Room looking north

(right is door to pantry and bath, left is door to back stairs)



Keeping Room Fireplace
looking west



Kitchen looking south



Bedroom #1 looking north



Bedroom #3 looking north



Bedroom #2 looking northeast



Bedroom #2 Fireplace looking south

APPENDIX B – 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. DEP is committed to upholding the provisions of ADA by 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 Assessments** – Reports produced by DEP documenting the conditions of a property’s structural systems, plumbing, heating and electrical systems, exterior and interior finishes, accessibility and historic preservation priorities
4. **Commissioner** – the Commissioner of the Department of Environmental Protection
5. **DEP** – the State of Connecticut, Department of Environmental Protection State Parks & Public Outreach Division, 79 Elm Street – 6th Floor, Hartford, CT 06106
6. **Department** – same as “DEP”
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 Environmental Protection to be significant to the history of the Connecticut State Park and Forest system or which is included or has been determined by the State Historic Preservation Office to be eligible for inclusion on the State or National Register of Historic Places

10. **Improvements** – work necessary for the rehabilitation of the property as set forth in the Building Conditions Survey or in an alternative rehabilitation plan proposed by the Resident Curator and approved by DEP
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** – also "public benefit"; work not considered improvements or maintenance services which is over and above the passive occupation of the property by a Resident Curator (i.e. educational programming, trail maintenance)
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 archaeological resources. Properties listed in the Register include districts, sites, buildings, structures, and objects that are significant in American history, architecture, archaeology, 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** – is the act or process of applying measures necessary to sustain the existing form, integrity, and materials of a historic property. Work, including preliminary measures to protect and stabilize the property, generally focuses upon the ongoing maintenance and repair of historic materials and features rather than extensive replacement and new construction. New exterior additions are not within the scope of this treatment; however, the limited and sensitive upgrading of mechanical, electrical, and plumbing systems and other code-required work to make properties functional is appropriate within a preservation project (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. **Project Manager** – the individual assigned by the Commissioner to be responsible for coordinating and managing all activities of the Department under the Resident Curatorship Program
17. **Public Benefit** – see *management services*
18. **Reconstruction** – the act or process of depicting, by means of new construction, the form, features, and detailing of a non-surviving site, landscape, building, structure, or object for the purpose of replicating its appearance at a specific period of time and in its historic location (SI)
19. **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)
20. **Restoration** – the act or process of accurately depicting the form, features, and character of a property as it appeared at a particular period of time by means of the removal of features from other periods in its history and reconstruction of missing features from the restoration period. The limited and sensitive upgrading of mechanical, electrical, and plumbing systems and other code-required work to make properties functional is appropriate within a restoration project (SI)
21. **SHPO** – State Historic Preservation Office, State of Connecticut, Commission on Culture and Tourism
22. **State Register of Historic Places** – The State Register of Historic Places is an official listing of properties and sites important to the historical development of Connecticut. It uses the same criteria for listing as the National Register. The State Historic Preservation Office is the responsible state organization for preparing, adopting and maintaining standards for the State Register of Historic Places
23. **Statutes** – the Connecticut General Statutes as amended including any rules, regulations and administrative procedures implementing said statutes
24. **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

APPENDIX C – RESIDENT CURATOR PROGRAM ENABLING LEGISLATION

Sec. 26-3B Rental, sale, exchange or transfer of real property and buildings in the custody or control of the commissioner. Right of first refusal. (a) When the Commissioner of Environmental Protection deems that it would be in the interest of the state, he may rent to any person, or assign departmental employees to occupy, houses, other buildings or property in the custody or control of said commissioner. If he rents property to persons who are not employees of the department he shall first obtain the approval of the State Properties Review Board and any such rent shall at least be equal to the fair market rental value of such property as determined by the commissioner, notwithstanding any other provision of the general statutes or of any regulations of any state agency. Rentals to persons other than departmental employees may be for commercial, residential or any other purpose that the commissioner deems to be in the interest of the state. If he assigns departmental employees to occupy such property, he may impose whatever conditions he deems necessary upon such assignment. He may also rent any such property to a departmental employee, and if, in his judgment, a rental fee should be charged to such employee, he shall determine such rental fee, notwithstanding any other provision of the general statutes or of any regulations of any state agency. The commissioner may, in the name of the state, execute leases, contracts or other documents to carry out the purposes of this section. All moneys from the rental of any such property shall be deposited into the maintenance, repair and improvement account established under section 22a-27h.

(b) Notwithstanding any other provision of the general statutes or of any regulations of any state agency, if the Commissioner of Environmental Protection determines that it would be in the interest of the state, he may, subject to the approval of the State Properties Review Board and the Governor, sell, exchange or otherwise transfer the state's interests in houses or buildings in the custody and control of said commissioner and land accompanying any such house or building provided no house, building or accompanying land shall be sold, exchanged or any interest therein transferred for less than its fair market value as determined by the commissioner. Said commissioner may, in the name of the state, execute deeds, contracts or other documents for such purposes. The commissioner shall ensure that any land sold under this section shall be subject to a deed restriction preventing further subdivision. The commissioner may require further conservation restrictions as part of such sale to prevent or limit other activities including, but not limited to, tree cutting or construction of additional structures. All moneys from any such sale, exchange or transfer of any interest pursuant to this section shall be used by the commissioner to carry out the purposes of the recreation and natural heritage trust program established under chapter 453.

(c) The commissioner shall grant a right of first refusal regarding the purchase of any land offered for sale under subsection (b) of this section to any person who has provided notice of interest in such right to the commissioner under this subsection and who provides evidence satisfactory to the commissioner that (1) such person is the husband or wife, parent, grandparent, sibling, child or grandchild of (A) a person who held title to the land in fee immediately prior to the state's taking title provided the state acquired such title on or after January 1, 1969, and prior to January 1, 1975, and (B) a person who owns land contiguous to the land being offered for

sale, or (2) such person (A) is the husband or wife, parent, grandparent, sibling, child or grandchild of a person who held title to the land immediately prior to the state's taking title provided the state acquired such title on or after January 1, 1969, and prior to January 1, 1975, and (B) owns land contiguous to the land being offered for sale. Notice of interest in such right shall be in writing and shall provide an address to which notice of an offer for sale may be sent and shall further provide any information the commissioner deems relevant to any determination required of him under this subsection. If he finds that such notice is complete, the commissioner shall send notice to such person, by certified mail, prior to offering such land for sale to any other person under subsection (b) of this section. Such right shall be exercised not later than thirty days after the date that notice of an offer for sale is received. In the event that more than one notice of interest is filed with the commissioner, the person who provided the first notice deemed complete by the commissioner shall be given the right of first refusal.

(P.A. 96-143, S. 3, 4; P.A. 97-71, S. 3, 4.)

History: P.A. 96-143 effective July 1, 1996 (Revisor's note: In codifying this section in Subsec. (b) the word "any" was added editorially by the Revisors in the phrase "... and land accompanying any such house or building provided no ..."); P.A. 97-71 added new Subsec. (c) re right of first refusal for certain persons related to former owners of land offered for sale under Subsec. (b), effective May 27, 1997.

APPENDIX D – PRESERVATION STANDARDS

DEP requires that the exterior of the property be preserved in its existing architectural style. Interior space may be adaptively reused, but remaining original detail is to be retained to the greatest extent possible. Preservation work and maintenance will be done by the Resident Curator with plans, specifications, and the work itself reviewed and approved by the DEP, in consultation with the Connecticut State Historic Preservation Office.

1. Historic Standards

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

- a. Every reasonable attempt should be made to provide for compatible uses that require minimal alterations.
- b. The proposed uses of the property must maximize both immediate and long ranges preservation of the structure and its environment.
- c. The distinguishing qualities and characteristics 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 without the express approval of the DEP.
- 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 Staff Archaeologist at the Connecticut State Historic Preservation Office. Should artifacts be discovered in the course of the project, they should be investigated and recorded by an archaeologist permitted by the Staff Archaeologist, and turned over to the appropriate curatorial facility in accordance with Connecticut General Statutes.
- e. With regard to the interior of the property, DEP's preference is for historical fabric to be preserved. However, the DEP 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.
- f. Every attempt should be made to maintain and care for the cultural and natural environment. Any earthmoving and excavation shall be reviewed by the DEP.

The Secretary of the Interior's Standards for Rehabilitation

The restoration, rehabilitation, and on-going maintenance of all Resident Curator properties must adhere to historic preservation standards. DEP relies on The Secretary of the Interior's Standards for Rehabilitation, which is the most widely accepted standard in the field. See:

<http://www.nps.gov/history/hps/TPS/tax/rhb/stand.htm>

The Standards (U.S. Department of Interior regulations, 36 CFR 67) pertain to historic buildings of all materials, construction types, sizes, and occupancy and encompass the exterior and the interior, related landscape features and the building's site and environment as well as attached, adjacent, or related new construction. The Standards are to be applied to specific rehabilitation projects in a reasonable manner, taking into consideration economic and technical feasibility.

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 causes 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.

For further information, please see a listing of National Park Service *Preservation Briefs* at:
www.nps.gov/history/hps/TPS/briefs/presbhom.htm
 and
www.nps.gov/hps/tps/tax/rhb/index.htm

Other Resources:

Connecticut:

CT Commission on Culture and Tourism
 1 Constitution Plaza, 2nd Floor
 Hartford, CT 06103
 860-256-2800
www.cultureandtourism.org

CT Trust for Historic Preservation
 940 Whitney Avenue
 Hamden, CT 06517-4002
 203-562-6312
www.cttrust.org

Regional:

Historic New England
 141 Cambridge Street
 Boston, MA 02114
 617-227-3956
www.historicnewengland.org
www.HistoricHomeowner.org

National Organizations:

National Trust for Historic Preservation
 Northeast Regional Office
 7 Faneuil Hall Marketplace - 5th Floor
 Boston, MA 02109
 617-523-0885
www.preservationnation.org/

National Park Service
 Heritage Preservation Services
 1201 "Eye" Street, NW
 Washington, DC 20005
 202-513-7270
www.nps.gov/history/hps/

APPENDIX E – SUSTAINABILITY RECOMMENDATIONS FOR EXISTING BUILDINGS

U.S. Green Building Council – “The U.S. Green Building Council is a 501(c)3 non-profit community of leaders working to make green buildings available to everyone within a generation.”

www.usgbc.org

Regreen Sustainability Guidelines – “The American Society of Interior Designers’ Foundation and the U.S. Green Building Council have partnered on the development of best practice guidelines and targeted educational resources for sustainable residential improvement projects. This program will increase understanding of sustainable renovation project practices and benefits among homeowners, residents, design professionals, product suppliers, and service providers to build both demand and industry capacity.”

www.regreenprogram.org

National Trust for Historic Preservation: Historic Preservation and Sustainability – The National Trust has recently launched an initiative to bring attention to sustainability issues and historic preservation. The site contains a number of useful resources for implementing green principles in historic rehabilitation.

www.preservationnation.org/issues/sustainability

APPENDIX F – CONSTRUCTION STANDARDS

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

- A. Connecticut State Building Code including Connecticut Fire Code;
- B. State Plumbing Code;
- C. Health Codes (if reuse is applicable, i.e. - restaurants, Bed & Breakfast, etc.);
- D. All other applicable local codes.

All work shall be reviewed and by DEP. All work to the building and plumbing system is subject to review and approval by the State Building Inspector. Electrical work is subject to the review and approval of the local electrical inspector.

APPENDIX G –

GUIDELINES FOR THE MAINTENANCE OF HISTORIC PROPERTIES

The Department of Environmental Protection presents the following Standards for the Maintenance of Historic Properties as a means to aid Resident Curators in the development of a long-term maintenance plan for Resident Curator Properties.

The purpose of these Maintenance Standards is to provide a means of evaluating the performance of the Resident Curator as well as to insure a high level of care and protection for these valuable historic resources. The guidelines herein are meant to provide a broad-based philosophy of maintenance, applicable to all historic properties. However, the Department acknowledges that the Curatorship properties vary in size and condition, with some properties requiring specialized attention to landscape and architectural details. Therefore, it is the DEP's goal to work with each Resident Curator in setting annual priorities for individual properties in order to both preserve the character of the property and minimize future expenditures.

The DEP intends to work cooperatively with the Resident Curator 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 Resident Curator and the public benefit of a well-maintained, attractive property. The DEP looks forward to working with Resident Curators toward the common goal of the preservation of Connecticut's historic properties.

- PART 1 METHODOLOGY**
- PART 2 MAINTENANCE STANDARDS**
- PART 3 REVIEW & INSPECTION**
- PART 4 MANAGING THE JOB**
- PART 5 ANNUAL INSPECTION CHECKLIST**
- PART 6 ANNUAL BUILDING AND LANDSCAPE QUICK-CHECKS**
- PART 7 CYCLICAL BUILDING AND LANDSCAPE QUICK-CHECKS**
- PART 8 AVERAGE LIFESPAN OF COMMON BUILDING MATERIALS**

PART 1 METHODOLOGY

A. Purpose

The purpose of this document is to describe the maintenance requirements of the Resident Curator Program and to provide the Resident Curator 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 Resident Curator Program properties include historic landscape elements which are character defining features of the property. In such cases, significant elements will be identified by DEP and specific maintenance treatments will be developed with the Resident Curator.

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, Resident Curators should anticipate cyclical needs and plan accordingly. Part 8 of these guidelines lists the average lifespan for some common building materials.

C. Goals of Proper Maintenance

1. Benefits to the Resident Curator

- 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, 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. Benefit to the State of Connecticut

- a. **Compatibility with Public Open Space** - Over the years DEP has acquired land for public use and has maintained these properties to a high standard. A comprehensive maintenance plan for a Resident Curator property will enhance the appearance of the DEP facility and promote the goals of the facility management plan.
- b. **Preservation of Historically Significant Property** - Almost all of the Resident Curator 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** – Resident Curator properties will be open to the public at least once each year, some more frequently. Regular maintenance of the property will add to the public enjoyment of the historic site.

PART 2 - MAINTENANCE STANDARDS

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

A. Building Exterior

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 Resident Curator 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 Resident Curator 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 Resident Curator 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 Resident Curator shall maintain the landscaped areas of the property in accordance with recognized standards for maintenance of historically-significant landscapes.

The Resident Curator 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 Resident Curator 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 Resident Curator shall keep all buildings free of destructive rodents and other animals or pests that may cause damage to the property.

If applicable, the Resident Curator shall maintain a septic system in compliance with the State of Connecticut Sanitary Code and shall maintain a potable water supply in accordance with State and local standards.

G. Sanitation

Properties shall be kept dean 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 Resident Curator 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 DEP.

H. Permitting

The Resident Curator 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 3 - REVIEW & INSPECTION

A. Review

Cyclical maintenance of the Resident Curator property may involve major changes to the building or landscape. Replacement of, or significant repair to, historic fabric including landscape elements, will require DEP approval.

B. Inspection

Each year a team of DEP representatives will inspect the property with the Resident Curator. Using the checklist found in Part 5, the inspectors will evaluate the condition of the property and the performance of the Resident Curator.

The Resident Curator 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 Part 6 will aid the Resident Curator 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 4 - MANAGING THE JOB

A. Planning Ahead

Resident Curators should develop a maintenance plan for the care and upkeep of the curatorship property. By taking the extra time to anticipate maintenance needs, Resident Curators will be able to plan for cyclical repairs and replacement of materials. Annual maintenance schedules and periodic inspection using the Quick-Check system will insure that the standard maintenance requirements are met.

B. Preservation Resources

Appendix D of the Request for Proposals provides a listing of preservation resources which may guide the Resident Curator in developing a maintenance plan.

C. Good Habits

A resident of a historic property should be especially critical of the appearance of his/her property. Take a moment each week to look at the major components of the building - roof, windows, foundation, etc. - for any changes or unusual characteristics. This regular inspection will become both a good habit and a source of pride in the success of your work.

While the goal of proper maintenance is the increased longevity of a historic property, the major benefit is the satisfaction of a job well done.

PART 5 ANNUAL INSPECTION CHECKLIST

This checklist will be used each year to evaluate the performance of the Resident Curator in maintaining the Curatorship property.

Resident Curator Program – Annual Maintenance Inspection Checklist

Property Name: _____

Date of Inspection: _____

Resident Curator (s) present: _____

DEP 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?

YES	NO	N/A	
			13. Does the house need splash pads?
			14. Does water collect near the foundation?
			Comments:

B. Chimneys (from roofline up)

YES	NO	N/A	
			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

YES	NO	N/A	
			1. Are the walls warped or bulging?
			2. Are doors and windows misaligned with their frames or operating improperly?
			3. Are there signs of settlement around the doors and windows?
			4. Is the exterior siding placed on the building properly?
			5. If wooden exterior walls, does the exterior siding undulate, buckle or curl?

			6. If brick or masonry walls, are mortar joints spalled, washed out or broken?
			Comments:

D. Exterior Woodwork

YES	NO	N/A	
			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 (the form of termite mud tunnels) on foundations, steps, or 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

YES	NO	N/A	
			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 properly 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 properly 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 walls 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, chalking or other paint surface reaction?
			Comments:

F. Doors and Windows

YES	NO	N/A	
			1. Are doors and windows properly 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 installed?
			6. If exterior storm windows are not feasible for historic or technical reasons, are interior storm windows installed?
			Comments:

G. Foundation and Masonry

YES	NO	N/A	
			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 (i.e., 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:

H. Driveways and Walkways

YES	NO	N/A	
			1. Are the walks and driveway surfaces in good condition, with no 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:

II. BUILDING INTERIOR

A. Cellar/Basement

YES	NO	N/A	
			1. Is the basement inadequately ventilated?
			2. Does the basement smell damp and moldy?
			3. Do sills or joists show signs of 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 wells, waste pipe failure, etc.?
			7. Is there any flooding in the basement?
			8. Is the bulkhead secured and properly 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. Insulation and Ventilation

YES	NO	N/A	
			1. Are the exterior walls insulated? If not, what insulating material is used, and was a vapor barrier installed?

			2. Is attic insulation properly installed?
			3. Does the attic insulation restrict adequate ventilation?
			Comments:

C. Finished Spaces

YES	NO	N/A	
			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?
			5. Are these cracks old or recently created?
			Comments:

D. Attic

YES	NO	N/A	
			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 sheathings)?
			Comments:

III. BUILDING SYSTEMS

A. Water Systems and Plumbing

YES	NO	N/A	
			1. Is water pressure adequate?
			2. If a private well, is the pump functioning?
			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 properly installed to prevent leaks, "sweating", or other water damage?
			Comments:

B. Heating System

YES	NO	N/A	
			1. Is the heating system functioning?
			Comments:

C. Sewage/Septic Systems

YES	NO	N/A	
			1. Are there odors emanating from the septic tank/field or sewage line area?
			2. If a septic system, are there any depressions or "wet spots" in the ground area adjacent to or within the septic field?
			3. Does the septic tank need pumping?

			Comments:
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D. Natural Gas Systems

YES	NO	N/A	
			1. Are there any natural gas/propane odors emanating from the system?
			2. If a propane tank is located on the property, is it properly secured?
			Comments:

E. Electrical Systems

YES	NO	N/A	
			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 meet the CT 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 system problems 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 and Cable Systems

YES	NO	N/A	
			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:

G. Fire and Security Systems

YES	NO	N/A	
			1. 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. MISCELLANEOUS PROVISIONS

YES	NO	N/A	
			1. 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 collected waste 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 or in plain view?
			Comments:

V. COMPLIANCE AND COMPATIBILITY

YES	NO	N/A	
			1. Is the overall appearance of the curatorship site compatible with the conservation and recreation goals of the DEP, as well as with those of the facility management plan?
			2. Has the Resident Curator complied with the reporting requirements of the lease agreement?
			Comments:

VI. REMINDERS

YES	NO	N/A	
			1. Are there any unpaid taxes on the property?
			2. Is the insurance coverage adequate and up to date?
			3. Do we need a copy of the insurance policy for the file?
			4. Are any utility services out of date?
			Comments:

PART 6 ANNUAL BUILDING AND LANDSCAPE QUICK-CHECKS

This checklist should be used throughout the year by the Resident Curator to identify potential problem areas and to prepare for the annual inspection of the Curatorship property.

Resident Curator Program – Annual Building Maintenance Quick-Check
Check when complete. List any items needing further attention.

3 MONTH INSPECTION

Date: _____

- Check roof for debris
- Clean downspouts and gutters. Oil gutters, if wooden.
- Check fuse box for proper operation and amperage of fuses

Follow Up On:

6 MONTH INSPECTION

Date: _____

- 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

Follow Up On:

9 MONTH INSPECTION

Date: _____

- Check exterior walls for bulges, settlement, and curling clapboards
- Check condition of exterior woodwork (trim, corner boards, posts, balustrades)
- Review plumbing system for leaks, "sweating" and general operation
- Inspect telephone lines to determine if they are free of obstructions

Follow Up On:

12 MONTH INSPECTION

Date: _____

- Inspect roof for leaks, shingle/slate coverage, structural changes, and proper ventilation
- Clean heating system (ducts and vents)
- Inspect and clean chimney
- 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

Follow Up On:

Resident Curator Program – Annual Landscape Maintenance Quick-Check
Check when complete. List any items needing further attention.

3 MONTH TASKS

Date: _____

- Inspect yard to see that it is properly maintained/picked up
- Removal of trash/debris
- Mow lawn regularly (April-November)
- Weed/water lawn and planting beds (April-November)
- Mulch (seasonal)
- Check irrigation systems
- Check foundation plantings for moisture retention

Follow Up On:

6 MONTH TASKS

Date: _____

- 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

Follow Up On:

9 MONTH TASKS

Date: _____

- Protect garden furnishings (paint as needed)
- Inspect garden structures
- Inspect driveway and drainage systems

Follow Up On:

12 MONTH TASKS

Date: _____

- Test soils for Ph and other factors (add supplements as needed)
- Clean drainage structures
- Repoint masonry on garden structures (as needed)

Follow Up On:

PART 7 CYCLICAL BUILDING AND LANDSCAPE QUICK-CHECKS

This checklist should be used by a Resident Curator periodically during the term of the lease in order to anticipate significant work items.

Resident Curator Program – Cyclical Building Maintenance Quick-Check
Check when complete. List any items needing further attention.

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)

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)

11-15 YEAR TASKS

- Replace linoleum and similar flooring materials
- Refinish wood floors (as needed)
- Repair or replace private well pump
- Replace gas dryer
- Replace propane tank

16-20 YEAR TASKS

- Replace roofing materials and wooden sheathing as necessary
- Replace synthetic (vinyl, aluminum, etc.) 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

SPECIAL CIRCUMSTANCES/CONDITIONS

- Elevator and dumbwaiter inspections as per state regulations

Resident Curator Program – Cyclical Landscape Maintenance Quick-Check
Check when complete. List any items needing further attention.

2-5 YEAR TASKS

- Replace/supplement path materials
- Drain and clean ornamental pool
- Remove invasive plants from property
- Stabilize stone walls
- Stabilize garden structures
- Replace lawnmower blades

5-10 YEAR TASKS

- Rejuvenate plant beds (as needed)
- Replace/stabilize driveway materials

11-15 YEAR TASKS

- Replace/repair garden water system
- Replace/repair wooden fencing and posts

16-20 YEAR TASKS

- Replant lawn area (as needed)

PART 8 AVERAGE LIFESPAN OF COMMON BUILDING MATERIALS

I. BUILDING EXTERIOR

A. Roof

- Asphalt Shingles _____ 15-20 years
- Slate/Tile _____ 60-80 years
- Wooden Shingle _____ 20-30 years
- Metal _____ 20-30 years

B. Chimneys

- Brick/Stone _____ 10-25 years (repoint)
- Clapboard or Metal cover _____ 15-20 years
- 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 _____ 7-10 years
- Well pump _____ 10-20 years
- Fixtures _____ varies
- Septic _____ pump every 2 years

2. Heating system

- Gas meter _____ 7 years
- Boiler _____ 15-20 years (repair at 10 years)
- Hot Water Tank _____ 5-10 years
- Dryer _____ 10-15 years
- Oil Tank _____ 25-30 years (inspect at 5 years)

3. Electrical System _____ 50 years

- Pull cords _____ 5 years
- Switch plates and outlets _____ 15 years
- Lighting fixtures _____ 20 years
- Electric heat pump _____ 20-25 years (repair at 10 years)
- Baseboard wiring _____ 2-5 years (repair)

4. Telephone Cable _____ 50 years (repair at 10 years)

5. Insulation _____ 2 years (check for settlement)

6. Life Safety Systems

- Smoke detectors _____ 15 years
- Home Security System _____ 10 years (repair)

APPENDIX I –

CONDITIONS ASSESSMENT FOR THE

SMITH-CURTISS HOUSE AND PROPERTY