

**From:** [Roland Bartl](#)  
**To:** [Kim Gorman](#)  
**Cc:** [Community Preservation Committee](#)  
**Subject:** CPC meeting - Exchange Hall  
**Date:** Wednesday, February 08, 2012 6:28:39 PM  
**Attachments:** [32E.Berger - Exchange Hall final award and acceptance.PDF](#)  
[32E.Berger - Exchange Hall NPS Part 3 final approval.pdf](#)

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As back-up information for agenda item 3 of the 2/9 CPC meeting, please post this e-mail and the attached items in docushare - thank you!

The 2008 Annual Town Meeting appropriation:

<b>E. Exchange Hall Renovations</b>	\$ 231,948.00
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**E. Exchange Hall Renovations**

The Exchange Hall, built in 1860 as a general store with function hall at the corner of School Street and Main Street in South Acton, is one of the most treasured and prominent historic buildings in Acton. The building is on the National Register of Historic Places and in the South Acton Local Historic District. The building is also listed among the most endangered historic treasures in the State. Situated on a postage-stamp lot, limited septic and parking capacities have held back its economic use and revitalization.

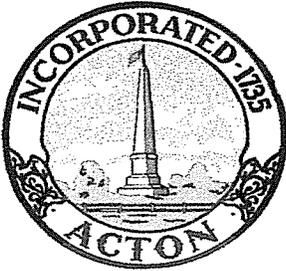
There are now solutions for both of these problems. An opportunity exists to bring the building back to its original grandeur and to put it back to economic use that can help sustain its future maintenance and contribute to the revitalization of South Acton Village. The owner, Bluebird Realty Trust has put forward a plan for the complete preservation and reuse of the property. The Board of Selectmen granted a Site Plan Special Permit for the site redevelopment, and the Historic District Commission issued a Certificate of Appropriateness for the expansion and restoration of Exchange Hall. The proposed CPA funding will assist in the exterior restoration of this historic building and signal to potential investors and creditors that the Town has a strong commitment to the building's restoration and revitalization.

Funding is limited to exterior restoration work of the Exchange Hall building. Such work must specifically include: slate roof restoration/replacement including the cupola roof; window restoration/replacement; rebuilding of the lower porch and deck; and scaffolding of the entire building. The total project, including the removal of one smaller building on the site and the restoration of another, is currently estimated to cost at least \$2 million. Funding of this project shall be subject to the following conditions:

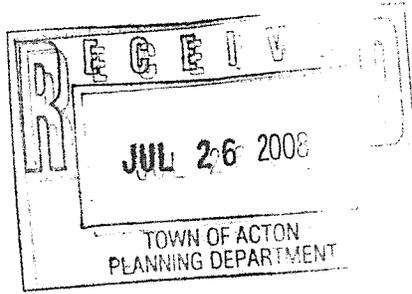
- Conveyance to the Town and recording of a historic preservation restriction on the Exchange Hall building that is in form and substance acceptable to the Community Preservation Committee and Town Counsel.
- The historic preservation restriction shall be perpetual to the extent permitted by law, subject to review after casualty damage or destruction.
- The historic preservation restriction shall include, or a separate recordable instrument shall covenant, that upon completion of all exterior and interior restoration work, the Town shall have right without any obligations and conditions to use Exchange Hall function space for one Monday per month for 15 years or such other equivalent period as the Town and the owner may agree from time to time.
- Payments shall be made after completion of all exterior and interior work items listed in the project funding application submitted to the Community Preservation Committee including all items funded by other sources.
- Certification by the Historic District Commission or their agent that the completed work meets the terms of the Certificate of Appropriateness.

- Receipt by the Acton Historic District Commission of all letters and certificates from the National Park Service that qualify the work as a historic rehabilitation project for the 20% federal preservation tax credit. The required National Park Service letters shall certify that:
  - (1) Exchange Hall meets the criteria for listing on the National Register (tax credit application Part I, Evaluation of Significance);
  - (2) The Exchange Hall rehabilitation plans submitted before the start of any restoration work meet the Secretary of the Interior's Standards for Rehabilitation of Historic Properties (tax credit application Part II, Description of Rehabilitation); and
  - (3) All finished work on Exchange Hall meets the Secretary of the Interior's Standards for the Treatment of Historic Properties (tax credit application Part III, Certification of Completed Work).

Roland Bartl, AICP  
Planning Director  
472 Main Street  
Acton, MA 01720  
(978) 929-6631



**Community Preservation  
Committee**



**TOWN OF ACTON**  
472 Main Street  
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[cpc@acton-ma.gov](mailto:cpc@acton-ma.gov)  
[www.acton-ma.gov](http://www.acton-ma.gov)

June 2, 2008

Mr. Glenn Berger  
Bluebird Realty Trust  
2 School Street  
Acton, MA 01720

**Re: 2008 CPA Project Funding – Exchange Hall Restoration**

Dear Mr. Berger:

Congratulations to being a recipient of 2008 Community Preservation funds (CPA funds) for the restoration of Exchange Hall. Your effort and cooperation during this year's project selection process helped secure the overwhelming support at the Annual Town Meeting for all but one of the Community Preservation Committee's (CPC) spending recommendations. Voters agreed that each funded project is worthwhile and now they expect that each will be well executed. Before you move forward with the project, please pay close attention to the following important instructions and funding conditions:

- The Town contact person assigned to this project is Town Manager Steven Ledoux. All necessary documentation and communication with the Town regarding this project shall be directed to him.
- Funding is limited to exterior restoration work of the Exchange Hall building. Such work must specifically include: slate roof restoration/replacement including the cupola roof; window restoration/replacement; rebuilding of the lower porch and deck; and scaffolding of the entire building.

- CPA funds shall be disbursed following completion of the entire restoration project to your satisfaction and consistent with the project scope presented in your project funding application to the Community Preservation Committee, including all exterior and interior work items listed in the funding application and including all items funded by other sources, and after:
  - a) receipt by the Town contact person of an invoice by you for reimbursement for completed services, including all back-up documentation and invoices for the entire project by the contractor(s) who performed the work;
  - b) the Town contact person has verified that the conditions of this award letter have been met;
  - c) Execution, conveyance to the Town, and recording of a historic preservation restriction on the Exchange Hall building that is in form and substance acceptable to the Community Preservation Committee and Town Counsel.
    - The historic preservation restriction shall be perpetual to the extent permitted by law, subject to review after casualty damage or destruction.
    - The historic preservation restriction shall include, or a separate recordable instrument shall covenant, that upon completion of all exterior and interior restoration work, the Town shall have the right without any obligations and conditions to use Exchange Hall function space for one Monday per month for 15 years or such other equivalent period as the Town and the owner may agree from time to time. The Community Preservation Committee requires the owner to negotiate in good faith with the Town to reach a mutually acceptable agreement for the use of the function hall with regard to the specific times of use, and the rules and requirements for such use. This agreement shall not be unduly burdensome on the owner or the Town, and shall meet the original intent of providing the Town with a practical usable space for the time specified.
  - d) Certification to the Town contact person by the Historic District Commission or their agent that the completed work meets the terms of the Certificate of Appropriateness.
  - e) Receipt by the Acton Historic District Commission and the Town contact person of all letters and certificates from the National Park Service that qualify the work as a historic rehabilitation project for the 20% federal preservation tax credit. The required National Park Service letters shall certify that:
    - Exchange Hall meets the criteria for listing on the National Register (tax credit application Part I, Evaluation of Significance);
    - The Exchange Hall rehabilitation plans submitted before the start of any restoration work meet the Secretary of the Interior's Standards for Rehabilitation of Historic Properties (tax credit application Part II, Description of Rehabilitation); and

- All finished work on Exchange Hall meets the Secretary of the Interior's Standards for the Treatment of Historic Properties (tax credit application Part III, Certification of Completed Work).
- All work shall comply with the Standards for Rehabilitation set forth in the United States Secretary of the Interior's Standards for the Treatment of Historic Properties, 36 C.F.R. Part 68.
- Payments will be made for the amount invoiced by the contractor(s) for CPA-approved restoration work up to \$231,948.
- Funds cannot be released until the Board of Selectmen has signed the Accounts Payable Warrant at a public meeting.
- Any significant changes to the project from what you represented in your application and during the project selection process shall require CPC approval. Please contact Roland Bartl, Town Planner (978-264-9636; [rbartl@acton-ma.gov](mailto:rbartl@acton-ma.gov)) to help determine what change is significant, and if necessary to schedule an appointment with the CPC.
- Upon full completion of the project and disbursement of funds, you must certify completion in writing to the Town Manager's office. Once it is received, your project account will be closed and no further funds shall be available for this project.
- Any CPA funds awarded to this project and not used upon project completion will be returned to the general CPA fund of the Town and made available for future appropriation by Town Meeting for other projects.
- Good publicity for your project is very important. It is exciting for Acton citizens to know where their CPA funds are being spent. It is also essential that the CPA remains strong at the State level. Therefore, the CPC asks that you make every effort to credit the source of this funding at any meetings and in any written materials related to this project. If possible, submit a letter to the Beacon detailing how the funds have benefited your project. The CPC has signs that give funding credit to the Acton CPA program and that should be posted at the project site.

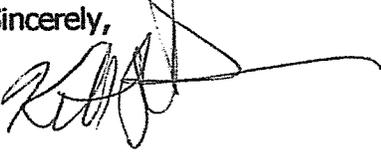
The Community Preservation Committee requires a notice when work on the project has commenced, periodic updates concerning the progress of your project, and especially upon completion. Specifically, the CPC requires that you submit copies of:

- All submittals to and correspondence to and from the National Park Service relative to the federal preservation tax credit program for historic preservation projects.
- All information and updaters related to financing commitments by lenders.
- Updates regarding required permits, plans, etc. as required for securing parking for the building.
- Reports on progress in the effort for securing viable tenants for the building.

For updates or general questions please contact the CPC via email - [cpc@acton-ma.gov](mailto:cpc@acton-ma.gov), or by calling the Planning Department at (978) 264-9636.

Finally, please sign and return to Roland Bartl the attached acceptance form. Thank you for working in partnership with the CPC to make a significant and lasting difference in our Town.

Sincerely,

A handwritten signature in black ink, appearing to read 'Ken Sghia-Hughes', with a long horizontal flourish extending to the right.

Ken Sghia-Hughes  
Chair  
Community Preservation Committee

cc: Board of Selectmen  
Steven Ledoux, Town Manager  
Roland Bartl, Planning Director  
Karen Kucala, Assistant Finance Director  
Acton Historic District Commission

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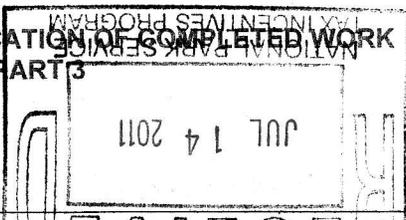


HISTORIC PRESERVATION CERTIFICATION APPLICATION  
REQUEST FOR CERTIFICATION OF COMPLETED WORK

RECEIVED

JUN 23 2011

MASS. HIST. COMM



NPS Office Use Only

NRIS No:

Instructions: Upon completion of the rehabilitation, return this form with representative photographs of the completed work (both exterior and interior views) to the appropriate reviewing office. If a Part 2 application has not been submitted in advance of project completion, it must accompany the Request for Certification of Completed Work. A copy of this form will be provided to the Internal Revenue Service. Type or print clearly in black ink. The decision of the National Park Service with respect to certification is made on the basis of the descriptions in this application form. In the event of any discrepancy between the application form and other, supplementary material submitted with it (such as architectural plans, drawings and specifications), the application form shall take precedence.

1. Name of Property: Exchange Hall  
Address of Property: Street 2 School Street  
City Acton County Middlesex State MA Zip 01720

Is property a certified historic structure?  yes  no If yes, date of certification by NPS: \_\_\_\_\_  
or date of listing in the National Register: 6-13-1986

2. Data on rehabilitation project:  
National Park Service assigned rehabilitation project number: #22927  
Project starting date: November 10, 2008  
Rehabilitation work on this property was completed and the building placed in service on: November 10, 2010  
Estimated costs attributed solely to rehabilitation of the historic structure: \$ #610,019.00  
Estimate costs attributed to new construction associated with the rehabilitation, including additions, site work, parking lots, landscaping: \$ 0

3. Owner: (space on reverse for additional owners)  
I hereby apply for certification of rehabilitation work described above for purposes of the Federal tax incentives. I hereby attest that the information provided is, to the best of my knowledge, correct, and that, in my opinion the completed rehabilitation meets the Secretary's "Standards for Rehabilitation" and is consistent with the work described in Part 2 of the Historic Preservation Certification Application. I also attest that I own the property described above. I understand that falsification of factual representations in this application is subject to criminal sanctions of up to \$10,000 in fines or imprisonment for up to five years pursuant to 18 U.S.C. 1001.  
Name Glen Berger Signature [Signature] Date: 6-7-11  
Organization Exchange Hall, LLC (previously Bluebird Realty Trust)  
Social Security or Taxpayer Identification Number 153-38-2532  
Street 2 School Street City Acton  
State MA Zip 01720 Daytime Telephone Number 978-835-9866

NPS Office Use Only

The National Park Service has reviewed the "Historic Certification Application - Part 2" for the above-listed "certified historic structure" and has determined:

that the completed rehabilitation meets the Secretary of the Interior's "Standards for Rehabilitation and is consistent with the historic character of the property or the district in which it is located. Effective the date indicated below, the rehabilitation of the "certified historic structure" is hereby designated a "certified rehabilitation." A copy of this certification has been provided to the Department of the Treasury in accordance with Federal law. This letter of certification is to be used in conjunction with appropriate Internal Revenue Service regulations. Questions concerning specific tax consequences or interpretation of the Internal Revenue Code should be addressed to the appropriate local Internal Revenue Service office. Completed projects may be inspected by an authorized representative of the Secretary to determine if the work meets the "Standards for Rehabilitation." The Secretary reserves the right to make inspections at any time up to five years after completion of the rehabilitation and to revoke certification, if it is determined that the rehabilitation project was not undertaken as presented by the owner in the application form and supporting documentation, or the owner, upon obtaining certification, undertook unapproved further alterations as part of the rehabilitation project inconsistent with the Secretary's "Standards for Rehabilitation."

that the rehabilitation is not consistent with the historic character of the property or the district in which it is located and that the project does not meet the Secretary of the Interior's "Standards for Rehabilitation." A copy of this form will be provided to the Internal Revenue Service

Date 7/20/2011 National Park Service Authorized Signature [Signature] National Park Service Office/Telephone No. NPS/TPS

See Attachments