

*Massachusetts
Historic Preservation
Conference 2017*



FRIDAY, SEPTEMBER 22

LOWELL, MASSACHUSETTS

*Bringing the preservation
community together to
share ideas, discuss challenges,
and celebrate successes.*



Welcome

Conference Organizer

Preservation Massachusetts

Local Hosts

Lowell Historic Board

Lowell Heritage Partnership

Lowell National Historic Park

The City of Lowell

The Massachusetts Preservation Coalition

Blackstone River Valley
National Heritage Corridor

Boston Landmarks Commission

Boston Preservation Alliance

Boston Society of Architects
Historic Resources Committee

Boston University Preservation Studies

Cambridge Historical Commission

Cape Cod Commission

Cape Cod Modern House Trust

Community Preservation Coalition

Dartmouth Heritage Preservation Trust

Department of Conservation
and Recreation

Essex National Heritage Area

Falmouth Preservation Alliance

Freedom's Way National Heritage Area

Historic Boston Inc.

Historic New England

Historical Nipmuc Tribe

Historic Salem, Inc.

Lowell National Historic Park

Lowell Historic Board

Massachusetts Historical Commission

Nantucket Preservation Trust

National Trust for Historic Preservation

North Bennet Street School

Pioneer Valley Planning Commission

Preservation Massachusetts

Preservation Worcester

Springfield Preservation Trust

UMass Amherst Historic
Preservation Studies

Waterfront Historic Area League,
New Bedford

We are delighted to be gathered in Lowell – a city synonymous with the industrial revolution, community, and historic preservation. This is a city fiercely proud of its heritage; it stands as a testament to the possibilities when dedicated advocates believe that historic resources can be vital, thriving, and contributing elements of the places we call home.

In 1978, the tireless efforts of many realized a national historic park in the mill city along the Merrimack River. Since then, Lowell has embraced preservation: today, nearly 98% of Lowell's historic mill space has been actively reused – from housing and offices to community health centers and critical social service programs. There is a tremendous amount of inspiration and education to gain from the Lowell preservation community.

As we planned the 2017 conference, we drew upon the success of our 2015 conference in Worcester and 2013 gathering in Lexington. We explored innovative ideas and discussed new trends and challenges that have arisen. Our goal was to provide attendees with the knowledge, resources, and network to be effective practitioners and preservation advocates in your neighborhoods, hometowns, and cities. We hope you find the sessions informative and inspiring, and we encourage you to network with fellow attendees.

As a host city, Lowell is especially exciting because it was at the forefront of the preservation movement nearly four decades ago. It is now a national model for the impact that historic restoration and reuse have on communities. Preservation Massachusetts feels a special kinship with Lowell through its connection with Senator Paul Tsongas and his efforts on behalf of historic preservation in his hometown, continued through the support of Congresswoman Niki Tsongas and their entire family.

Thank you to our local hosts the Lowell Historic Board, the Lowell National Historic Park, and also to the Lowell Heritage Partnership and the City of Lowell. Our thanks to the University of Massachusetts Lowell Inn and Conference Center and to the Massachusetts Preservation Coalition for its support and contributions in developing today's agenda. Thanks to all of our speakers and volunteers. We also wish to recognize our sponsors, especially the Kuehn Charitable Foundation, who have helped to make our conference a reliable constant of preservation education in the Commonwealth.

We appreciate you being with us on the first day of autumn for an enlightening conference. Thank you for all that you do to make preservation a reality in Massachusetts.



*Jim Igoe, President
Preservation Massachusetts*



*Erin Kelly, Associate Director
Preservation Massachusetts*

NOTES ON THE DAY

Schedule

8:00am-8:45am	Registration & Continental Breakfast	Ballroom
8:45am-9:30am	Welcome & Keynote Address	Ballroom
9:45am-11:30am	Session 1	ICC*
11:45am-12:45pm	Lunch & Networking	Ballroom
1:00pm-2:30pm	Session 2	ICC*
3:00pm-4:30pm	Session 3	ICC*
4:30pm-6:30pm	"Thanks for Preservation" Event	50 Warren Room

* The UMass Lowell Inn & Conference Center (ICC) is located at 50 Warren Street, Lowell, MA 01852. See session descriptions for room locations within the ICC. All tours will leave from the ICC.

Keynote Speaker: Lisa Craig, Chief of Historic Preservation, City of Annapolis

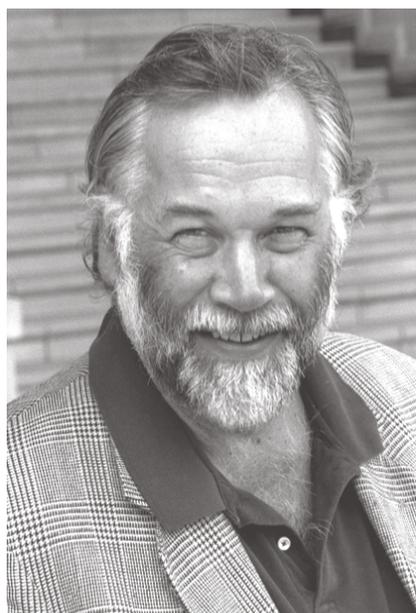
With 25 years of experience in historic preservation, Lisa Craig promotes historic places as economic, sustainable, dynamic, and creative community assets with a goal of collaborating with public and private partners to make historic communities the preferred place to live, work and visit. She has diverse and deep experience with issues that include Sea Level Rise Adaptation Planning, Public Outreach & Community Engagement, and Preservation Planning. We are delighted to host Lisa as our keynote speaker this year.

"Thanks for Preservation" Event

At the conclusion of the conference, you are invited to the "Thanks for Preservation" Event. This privately sponsored event is a way for Preservation Massachusetts to say thank you for all you do and to allow for continued spirited networking. Join old friends and hopefully some new ones as you enjoy hors d'oeuvres and a cash bar overlooking the scenic canal locks just outside of the conference center. The event will take place from 4:30pm-6:30pm. If you're not ready to head home after that, be sure to check out some of the great restaurants that Lowell has to offer.

Believing in Preservation: Bob Kuehn

The 2017 Massachusetts Historic Preservation Conference celebrates the memory and ingenuity of Bob Kuehn (1942-2006). Bob was a pioneer in the field of affordable housing, community development, and preservation through his company, Keen Development. Bob was a longtime Board member of Preservation Massachusetts, and his dedication to historic buildings reflects the true spirit of preservation – one of partnership, collaboration, and community. He was integrally involved with the founding and support of the Community Preservation Act and was an advisor to the National Trust for Historic Preservation. Bob was a true visionary, and we hope to keep his spirit and memory alive by inspiring others to take on challenging projects, seek new partnerships, and make the old new again.



The support of Bob's foundation, the Kuehn Charitable Foundation, has been integral to the planning and organizing of this conference, and to that end, we are grateful and proud to align the conference with his name.

SESSION 1 | 9:45-11:30 AM

1a What I Did on My Summer Vacation:

Cruising the Commonwealth LOWER LOCKS 1

James Igoe President, Preservation Massachusetts
Erin Kelly Associate Director, Preservation Massachusetts

Preservation Massachusetts spent the summer “cruising” the Commonwealth, hearing directly from local partners, organizations, and individuals about issues, needs, thoughts, challenges, wishes, successes, and ideas for the future of preservation. Join us for a lively discussion on what we learned from our meetings, how much preservation has (or hasn’t) changed over the past several decades, and ideas on where we go from here.

1b Lowell’s Revitalization: Economic Development Through Historic Preservation HAMILTON

Peter Aucella Assistant Superintendent, Lowell National Historical Park
James Cook Executive Director, The Lowell Plan; Lowell Development & Financial Corporation
Diane Tradd Assistant City Manager for Planning and Development, City of Lowell

Lowell has used historic preservation as its economic development strategy. Nearly 500 buildings have been renovated, including almost 5.3 million square feet of mill space and miles of canal walkways. Good planning, partnerships, design controls, and unique financial incentives have guided this redevelopment effort. This presentation by local leaders from city government, banking, and historic preservation will highlight the challenges and innovations brought to downtown redevelopment and targeted neighborhood urban renewal areas, all guided by historic preservation principles. Moderated by Peter Aucella.

1c The More the Merrier: Collaborating for Successful Preservation Projects CONCORD

Teri Bernert Executive Director, Waterfront Historic Area League (WHALE)
Lisa Howe Director, Building Conservation Associates, Inc., New England Branch
Kathy Kottaridis Executive Director, Historic Boston Incorporated
Russ Tanner Vice President of Real Estate, Madison Park Development Corporation

Successful preservation projects often require collaboration among non-traditional partners and alliances from outside the preservation field. This session presents three case studies that involve a variety of project sponsors, funders, investment partners, and end users who may have approached their projects with different motivations, but all with a common goal: turning around historic buildings for new uses. Project representatives will detail partner perspectives, market conditions, funding sources, and legal structures that made the preservation of their buildings and landscapes possible. Moderated by Lisa Howe.

1d What’s Buzzing? Drones for Historic Preservation MERRIMACK

Jack Glassman Historical Architect, National Park Service/Historic Architecture, Engineering and Conservation (HACE)
Benjamin Haavik Team Leader of Property Care, Historic New England
Kelly Streeter Structural Engineer and Partner, Vertical Access LLC
Tim Sturgeon Researcher, Entrepreneur, Pilot, QuadcopterDigital LLC

Small unmanned aerial vehicles (sUAVs) – flying camera platforms commonly known as drones – are proving their usefulness as historic preservation tools capable of providing extraordinary close-range aerial views of buildings, monuments, and sites. Integrated with photogrammetry software in post-processing, these tools facilitate fast, inexpensive, and non-intrusive generation of 3D models. Learn about the latest applications, including aerial videography and photography for documentation and interpretation, 3D-modeling of structures and topography, repair planning/validation, and capturing as-built measurements. The presentation will also cover the latest regulatory issues pertaining to the commercial operation of sUAVs. Moderated by Jack Glassman.

1e Recent Successes & New Opportunities in Historic Rehabilitation Tax Credits JR. BALLROOM

Erin Doherty Preservation Planner, Massachusetts Historical Commission
Jo Ellen Hensley Technical Preservation Services, National Park Service
Elizabeth Sherva Preservation Planner, Massachusetts Historical Commission
Brona Simon Executive Director, Massachusetts Historical Commission

This advanced training session – for developers, consultants, and other program users – will be led by administrators of the federal and state historic tax credit programs at the National Park Service (NPS) and Massachusetts Historical Commission. Staff will report on current program activities, review best practices and common reasons for delayed approvals, review updates on the transfer of state tax credit awards, and introduce new instructions for state applications. Recently issued guidance from NPS on multiple building projects, continued historic use, highly deteriorated conditions and acquired significance will also be addressed. Moderated by Erin Doherty.

1f Building Better Communities TOUR: BOAT, WALKING

Yun-Ju Choi Executive Director, Coalition for a Better Acre
Craig Thomas Director of Real Estate, Coalition for a Better Acre

The Coalition for a Better Acre (CBA) is a community development corporation dedicated to resident empowerment and sustainable community revitalization for current and future residents of Lowell and the Merrimack Valley. See how the CBA has utilized historic preservation as a successful neighborhood revitalization strategy.

1g Getting to 98%: Mill Rehabilitation and Reuse TOUR: BUS, WALKING

Christine Bruins Planner, Lowell National Historical Park

Since the creation of Lowell National Historical Park in 1978, nearly 98% of 5.3 million square feet of former mill space in the Downtown Lowell Historic District has been rehabilitated for a variety of uses. Discover how several mills have been converted into new uses including office, retail, institutional, and residential.

SESSION 2 | 1:00-2:30 PM

2a Adopting the Community Preservation Act: Dedicated Funding for Historic Preservation MERRIMACK

John Dickson Chairman, Pittsfield Historical Commission
Robert McCarroll Board of Directors, Springfield Preservation Trust Inc.
Stuart Saginor Executive Director, Community Preservation Coalition

The Community Preservation Act (CPA) has rapidly become one of the largest sources of funding for historic preservation in the Commonwealth. But what if your community hasn't adopted CPA yet? This panel will explain how CPA works and outline what you need to know to adopt the Act in your community. Historic preservation advocates will discuss how their communities adopted CPA and how valuable the program has been to their local historic preservation efforts. This session is geared to attendees from municipalities that don't have CPA. Moderated by Stuart Saginor.

2b The Building Blocks of Local Advocacy LOWER LOCKS 2

Gregory Farmer Historic Preservation Specialist, Agricola Corporation
Erin Kelly Associate Director, Preservation Massachusetts
Stephen Stowell Historic Board Administrator, City of Lowell

Who supports your local preservation project or shares your thoughts on an issue? How do you start to promote preservation in your community? Preservation is about people, and the challenge is how to engage them. Hear about successful constituency building methods, why outreach and collaboration are essential, the importance of community leadership, and best practices like utilizing social media and grassroots marketing. Moderated by Erin Kelly.

2c Alternative Materials & Where to Allow Them JR. BALLROOM

Patti Kelleher Community Development Planner, City of Salem
Nicole Sanches SolSmart Advisor, Metropolitan Area Planning Council
Charles Sullivan Executive Director, Cambridge Historical Commission
Shannon Walsh Springfield Historical Commissioner

When requesting modern alterations using contemporary materials, historic commissions often have to balance protecting contributing architectural features of historic resources with working with property owners. When are contemporary changes to historic buildings appropriate? Can synthetic materials and modern technology be used on historic resources while protecting architectural integrity? The Salem Historical Commission and the Cambridge Historical Commission will share examples of how they have successfully worked with property owners to create unique solutions to these modern challenges. Moderated by Shannon Walsh.

2d Rising Water & Historic Resources CONCORD

Lisa Craig Chief of Historic Preservation, City of Annapolis
Julia Knisel Coastal Shoreline and Floodplain Manager, Massachusetts Office Coastal Zone Management
Tom O'Shea Director of Stewardship & Natural Resources, The Trustees of Reservations
Jon Rudzinski Principal, Rees-Larkin Development

This panel will address the very real 21st century issues caused by rising water on historic buildings and places, whether they occur through flood events or long-term sea level rise. Panelists will present ways to locate essential mapping information and

applicable government regulations, to plan for potential rising water, and to develop resilient building rehabilitation designs. Moderated by Lisa Craig.

2e Archaeology & Its Role in Project Planning & Public Outreach HAMILTON

Joseph Bagley City Archaeologist, City of Boston
Mary Beaudry Professor of Archaeology, Anthropology, & Gastronomy, Boston University
Kristen Heitert Principal Investigator, Public Archaeology Laboratory
David Landon Associate Director, Fiske Memorial Center for Archaeological Research, UMass Boston

Archaeology in Massachusetts often is conducted as a state-permitted, project planning requirement similar to wetland surveys and traffic control studies. It is unique, however, in its focus on past – rather than existing – historical conditions and the degree of emotional resonance that its results can have with the public. This session will present the whens, whys, and hows of conducting archaeology in a regulatory context so that it functions as an integral element of project planning rather than a panicked afterthought. It will also explore how archaeology in Boston, Plymouth, and Lowell – both inside and outside regulatory review – has expanded our understanding of their historical development, and how the public presentation of that work has been vital to the preservation and stewardship of some of the state's most important historical resources. Moderated by Kristen Heitert.

2f Benefits of Historic Preservation: Economic, Environmental, Educational, Emotional LOWER LOCKS 1

Chris Skelly Director of Local Government Programs, Massachusetts Historical Commission

While the benefits may be all around us, effectively advocating a preservation approach can be challenging. This can be particularly true at the local level, with its varied interest groups, constituents, goals, and agendas. With quotes in hand from the surgeon general, economists, the American Psychological Association, and others, this session will describe what historic preservation offers, regardless of affinity, and how to articulate the benefits of preservation to those that would never call themselves preservationists.

2g Lowell: Then & Now TOUR: TROLLEY, WALKING, BOAT

Charles Parrott Former Historical Architect, Lowell National Historical Park

Nearly \$1 billion in private and public investment has taken place within the Downtown Lowell Historic District since the early 1980s. This tour will highlight mill and commercial rehabilitation, as well as public realm improvements that have preserved and sustained Lowell's historic character and context.

2h Tax Credit Success Stories TOUR: TROLLEY, WALKING

Peter Aucella Assistant Superintendent, Lowell National Historical Park

Since 1984, at least 45 projects in Lowell have utilized the federal historic rehabilitation tax credit, totaling over \$530 million in development. Since 2004, nearly \$50 million in state historic credits have been awarded to 26 projects. Discover several of these projects, including mill and commercial building rehabilitations.

SESSION 3 | 3:00-4:30 PM

3a The Partnership of Land Conservation and Historic Preservation MERRIMACK

Jane Calvin Executive Director, Lowell Parks & Conservation Trust
Clarissa Rowe Principal, Brown, Richardson + Rowe

Learn how land conservation and historic preservation projects can work effectively in partnership. How does the Lowell National Historical Park showcase the history of the mills along the Merrimack River and canalways while also highlighting the use of water in the 19th to the 21st century? How does the work of the Lowell Parks and Conservation Trust, in its renovation of the Spalding House, show the importance of the site, which is adjacent to the Falls along the Merrimack River? How does the Trustees of Reservation property, Fruitlands in Harvard, evolve from the experimental utopian community founded by Bronson Alcott in 1843 to the modern day? How does a large estate of Miss Doyle, one of the major benefactors of Leominster, become the center of the Leominster Community Park with a LEED Gold Building for the Trustees? We will discuss the guiding principles of land conservation and how they can work seamlessly with historic preservation projects of all sizes.

3b Project Development/Economic Development: Small-Scale Financing CONCORD

Dan Kolodner Partner, Klein Hornig LLP
Jason Korb Principal, Capstone Communities LLC
John Mackey Chair and Senior Lecturer, Social Sciences, Boston University
Nicholas Ratti Principal, CohnReznick LLP

Historically, investors in transactions utilizing the federal and/or state historic credit are widely held C corporations. Such entities typically want to invest in large transactions for various reasons, and recent changes in tax laws related to these transactions have exacerbated this situation. This panel will explore alternatives to this approach for transactions that are less than \$3 million of historic credits. The panelists have seen this approach used for transactions as low as \$500,000 of federal credits and will use case examples to illustrate the approach and the development, legal, and accounting (tax) implications. Moderated by John Mackey.

3c A Developer, Lawyer & Architect Walk Into a Historic Mill ... Lessons Learned From Historic Tax Credit Projects HAMILTON

Alisa Augenstein Senior Preservation Planner, VHB
Janis Mamayek Principal and Director of Architecture, ICON Architecture
Deirdre Robinson Partner, Murtha Cullina Law
Adam Stein Senior Vice President, WinnDevelopment

Historic tax credit projects are never as simple as they initially appear – unforeseen challenges and glitches arise during every phase of a building's rehabilitation. This session will provide insights from the primary players involved in these projects, including a developer, lawyer, architect, and consultant and how each has navigated their way through the challenges presented in an array of small, medium, and large-sized historic tax credit projects located throughout the Commonwealth. Moderated by Alisa Augenstein.

3d Creative Strategies for Funding the Preservation of Your Historic Site JR. BALLROOM

Stacia Caplanson Western MA Circuit Rider, Preservation Massachusetts
Jeff Gonyeau Eastern MA Circuit Rider, Preservation Massachusetts
Jim Igoe President, Preservation Massachusetts
Earl Taylor President, Dorchester Historical Society

This session is geared toward organizations, property owners, or other entities seeking to complete small to midsize preservation projects. Panelists will provide an overview of Preservation Massachusetts' Predevelopment Loan Fund program, which provides loans to cover project planning costs that are often necessary in jump-starting successful preservation projects. The session will also include a presentation on fundraising strategies – from government grant programs, to foundation grants, to earned income – followed by an in-depth case study describing the work of the Dorchester Historical Society (DHS) over the last decade. DHS has used a variety of creative strategies to fund award-winning preservation projects on its multi-building historic site in Boston. Moderated by Stacia Caplanson.

3e Historic Preservation: With or Without a Local Historic District LOWER LOCKS 1

Chris Skelly Director of Local Government Programs, Massachusetts Historical Commission

Historic preservation efforts at the local level often focus on regulatory means, such as a local historic district, to achieve desired preservation results. However, with a high bar to pass, this approach is limiting, time-consuming, and in the end, often unsuccessful. Local historical commissions and other local groups interested in protecting historic resources will find far more success if they develop a balanced approach, unique to their community, and based on a wide range of effective tools. It is hoped that, through this session, local preservationists will recognize the benefits of a realistic, cooperative, and comprehensive approach.

3f New Design in Old Places TOUR: TROLLEY, WALKING

Stephen Stowell Historic Board Administrator, City of Lowell
Charles Tonetti Architect, Lowell National Historical Parks

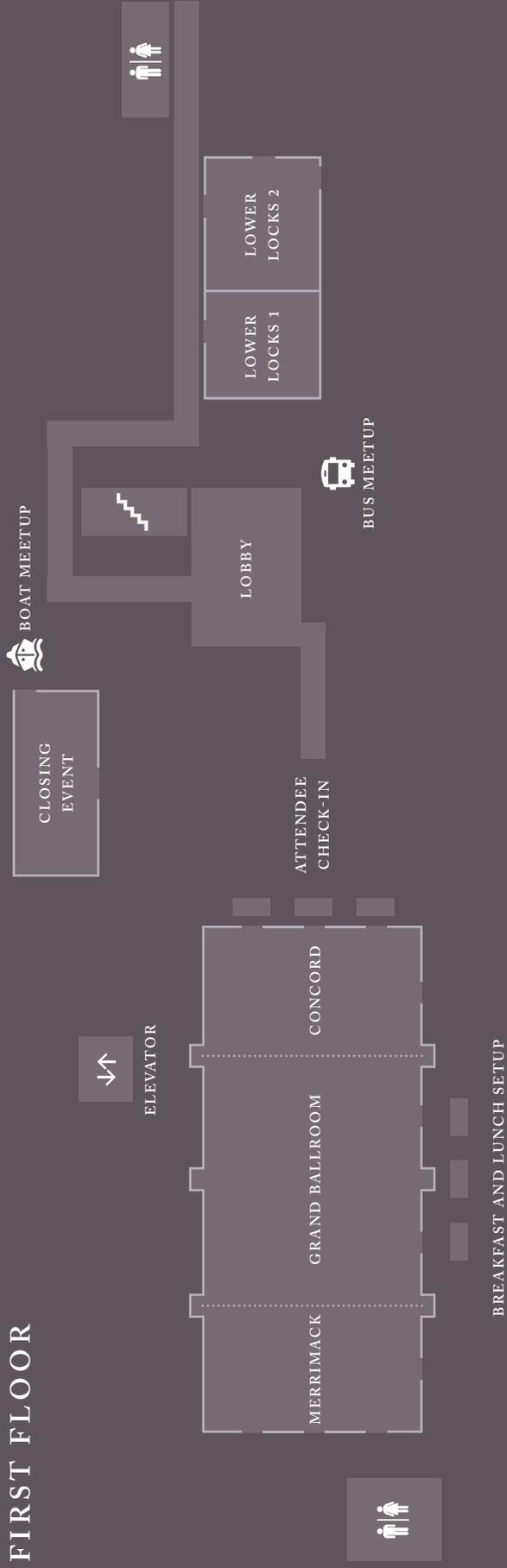
Discover how new buildings and landscapes can be successfully integrated into an historic context on this trolley and walking tour. Several completed projects in the Downtown Lowell Historic District will be highlighted, as will some still on the drawing board, all illustrating that a successful blending of the old and new can be achieved.

3g Church Restoration, Recycling, and Repurposing TOUR: BUS, WALKING

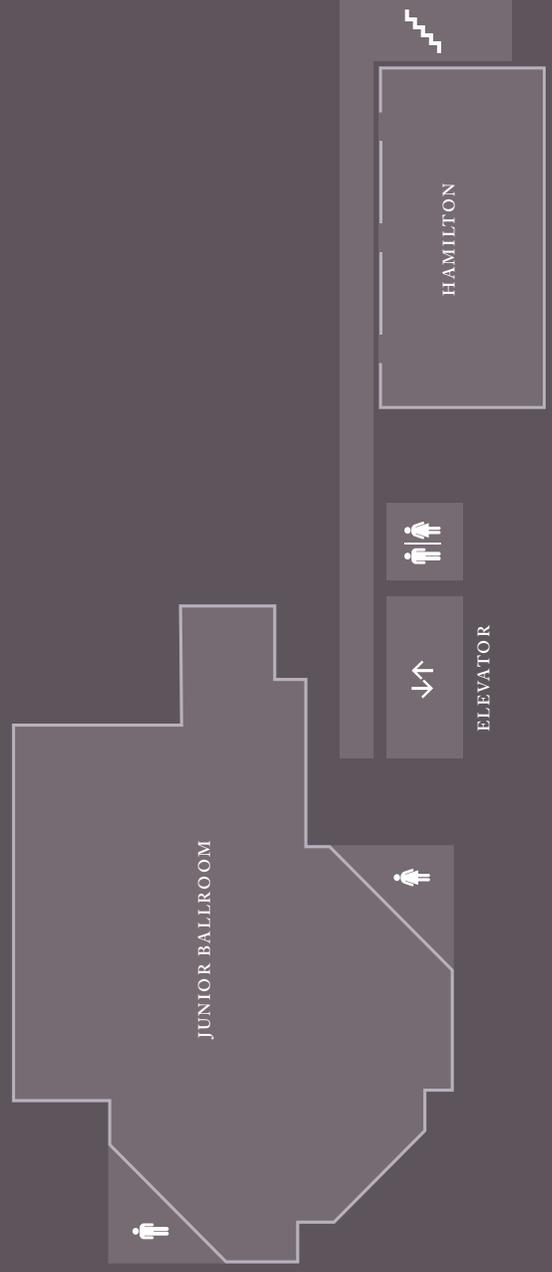
David Byers Park Ranger, Lowell National Historical Parks

The preservation and reuse of historic religious structures can present significant challenges to overcome. On this bus and walking tour, discover several current and former churches that have approached these challenges in different ways, including the world's oldest LEED Platinum certified structure in the world.

FIRST FLOOR



SECOND FLOOR



RECOGNITION

Preservation Massachusetts gratefully acknowledges the sponsors supporting this year's conference.

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The Massachusetts Preservation Coalition, its directors, and staff for their input and assistance in promoting the conference, speaking on panels, leading sessions, and for their continued work each and every day on behalf of preservation efforts in Massachusetts.

Lowell Historic Board Executive Director Steve Stowell, the Board of Directors, staff and docents, and the Lowell National Historical Park Deputy Superintendent Peter Aucella, staff, resources and volunteers from the National Park Service for their hospitality, coordination, support, and partnership in making this conference possible in Lowell.

The University of Massachusetts, Lowell Inn and Conference Center, staff, facilities, security and others for their assistance with today's conference.

The City of Lowell for being gracious and accommodating local hosts for our conference and attendees and a model preservation community.

Preservation Massachusetts' Board of Directors for their leadership, guidance, and support during conference planning and those who are participating at the conference.

Preservation Massachusetts staff for their coordination, planning, oversight, and outreach on behalf of the conference, specifically Erin Kelly, Julie Roper, Jeffrey Gonyeau, Stacia Caplanson, and Liz Nash.

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To all who are dedicated to ensuring the history and heritage of their communities for future generations.