



Community Preservation Committee Meeting

Thursday, February 1, 2024 at 7:00 PM
Remote Participation Only

Agenda

Pursuant to Chapter 2 of the Acts of 2023, the meeting and public hearing will be conducted with remote opportunities for participation. Remote participation and access methods include:

ACCESS INFORMATION:

- A. This meeting will be held on February 1, 2024 at 7PM. Location: Remote Participation Only
- B. The meeting will be recorded through WCATV (Watertown Cable Access Television) and aired at a later date: <http://vodwcatv.org/CablecastPublicSite/watch-now?site=3>
- C. The Public may join the virtual meeting online: <https://watertown-ma.zoom.us/j/91525442843>
- D. Public may join the virtual meeting audio only by phone: (877) 853-5257 or (888) 475-4499 (Toll Free) and enter Webinar ID: 915 2544 2843
- E. Public may comment prior to meeting via email: lhandy@watertown-ma.gov
- F. Please Visit the Community Preservation Committee Website here: <https://www.watertown-ma.gov/352/Community-Preservation-Committee>

-
- 1. Call to Order
 - 2. CPA Project Presentations
 - A. Browne House Project Application
 - B. Mt. Auburn Scots Charitable Society Fence Restoration Application
 - 3. Adjourn

Mark Krackiewicz, Chair
Jonathan Bockian, Vice Chair
Bob DiRico

Dennis J. Duff
Allen Gallagher
Abigail Hammett

Jamie O'Connell
Elodia Thomas
Matthew Walter

CPA Funding Application

Applications are due by the deadline posted on the Watertown Community Preservation Committee website watertown-ma.gov/CPC.

After receiving notification of project eligibility, applicants must complete the CPA Funding application online, complete and upload the CPA Application Budget, and upload any other required attachments.

If your project involves municipal property, state procurement laws apply. Please go to technical assistance information and review the article, *Do the State's Procurement Laws Apply to CPA Projects?* regarding public procurement laws at communitypreservation.org/procurement

Is your application complete? Use the Submission Requirements Checklist to ensure all required materials are included in your application. Incomplete applications may be delayed or denied funding.

PROJECT INFORMATION

Browne House Structural Engineering

▲ PROJECT NAME

562 Main Street, Watertown, MA

▲ PROJECT LOCATION (PROVIDE EXACT ADDRESS)

▲ PROJECT ACREAGE

The Society for the Preservation of New England Antiquities d/b/a Historic New England

▲ LEGAL PROPERTY OWNER OF RECORD

Historic New England will hire a structural engineer to develop plans and specifications for repairing and reinforcing the rare, seventeenth-century framing system at Browne House.

▲ PROJECT DESCRIPTION (ONE SENTENCE)

Project Eligibility: Check at least one of the boxes below. See CPA Allowable Spending Purposes on page 7.

	Open Space	Outdoor Recreation	Community Housing	Historic Preservation	
Acquire	☐	☐	☐	☐	Estimated Start Date 07/01/24 /
Create	☐	☐	☐	☐	Estimated Completion Date 03/31/25 /
Preserve	☐	☐	☐	☒	CPA Funding Request \$ 7,250
Rehabilitate/ Restore*	If acquired or created with CPA Funds ☐	☐	If acquired or created with CPA Funds ☐	☐	Non-CPA Funding \$ 7,250
Support			☐		TOTAL Budget for Project \$ 14,500

APPLICANT INFORMATION

The Society for the Preservation of New E

▲ APPLICANT NAME

☐

CITY DEPARTMENT

☐

CITY COMMISSION/COMMITTEE.

▲ ORGANIZATION

☒

NON-PROFIT

☐

PRIVATE GROUP OR INDIVIDUAL

▲ CO-APPLICANT NAME

☐

CITY DEPARTMENT

☐

CITY COMMISSION/COMMITTEE.

☐

NON-PROFIT

☐

PRIVATE GROUP OR INDIVIDUAL

Katherine Pomplun, Institutional Giving Officer

▲ PRIMARY CONTACT PERSON

151 Essex St. Haverhill MA 01832

▲ MAILING ADDRESS

+1 (617) 994-5954

▲ PHONE NUMBER

grants@historicnewengland.org

▲ EMAIL ADDRESS

Jodi Black, Supervising Preservation Manager

▲ PROJECT MANAGER

151 Essex St. Haverhill MA 01832

▲ MAILING ADDRESS

+1 (617) 997-5580

▲ PHONE NUMBER

jblack@historicnewengland.org

▲ EMAIL ADDRESS

PROJECT NARRATIVE

Describe the project and how you plan to accomplish it. ▼

Please see extended narrative responses attached.

How does this project meet the general priorities and specific funding category goals outlined in the CP Plan? ▼

Please see extended narrative responses attached.

Why is this project needed and what are the public benefits? Who will be served by this project—e.g. particular demographic population or city district? ▼

Please see extended narrative responses attached.

Have you sought input or support from any boards, commissions, committees, community groups, or individuals? If so, please provide details▼

Historic New England presented the proposed project to the Watertown Historical Commission on September 14, 2023. A letter of support for the project was submitted to the Community Preservation Committee by Chair Elise Loukas.

Historic New England also contracted with structural engineers Simpson Gumpertz & Heger to obtain a Structural Conditions Assessment Report, which includes detailed analysis of the existing structural problems and was used to further define the scope of work for the proposed project.

How does this project incorporate universal design and comply with accessibility regulations (ADA/MAAB)?▼

The proposed planning project will not affect accessibility at Browne House but could lead to improvements when repairs are later implemented, as the post shores that currently support the framing obstruct visitor circulation in the museum spaces. These will be removed once the framing is sufficiently reinforced. To accommodate visitors who are unable to access interior spaces on the second floor, Historic New England has created a detailed virtual tour of Browne House using Matterport technology (my.matterport.com/show/?m=o5zZ9ogUVQX). Our work to improve the accessibility of our sites and programs is driven by a staff accessibility task force and summarized in our commitment statement at www.historicnewengland.org/accessibility.

How does this project incorporate environmental sustainability?▼

Historic New England's property care team evaluates all project planning at our historic sites through a sustainability and climate resiliency lens. For the proposed project at Browne House, the structural engineer will present multiple options for repair, and staff will ultimately identify and select the solution that best resolves Browne House's structural deficiencies while ensuring the use of sustainable construction materials and preservation strategies that are sensitive to existing historic fabric.

PROJECT MANAGEMENT

Describe the qualifications and experience of key project professionals: project manager, design professionals, and other key consultants participating to successfully complete the project.▼

Historic New England intends to engage the structural engineering firm Simpson Gumpertz & Heger to design the plans and specifications for repair at Browne House. Project work will be coordinated by Principal Matthew Bronski, whose twenty-eight years of experience at SGH includes many projects on highly significant historic buildings and prior work with Historic New England's property care team.

Describe the roles, responsibilities, and time allocation of team members involved in the project. For example: who will manage the finances, who will oversee the project scope, and who will maintain the resource after project completion?▼

Historic New England's property care team has extensive experience with capital improvements, planning studies, and the successful management of grant-funded projects. Jodi Black, supervising preservation manager, has fifteen years of experience with Historic New England and will oversee the project scope and budget. Katherine Pomplun, institutional giving officer, will ensure compliance with all grant terms and reporting requirements. Detailed financial and project management systems are in place to ensure timely and effective project completion. Preservation and maintenance for all Historic New England properties is managed by our fifteen-person property care team, led by Team Leader Benjamin Haavik since 2004.

PROJECT SCHEDULE

Outline the project timeline, including the milestones and key steps necessary to successfully complete the project. (Note: CPA funding disbursements and project reporting may correspond to these milestones.)▼

Please see extended narrative responses attached.

FEASIBILITY

Detail your process for obtaining required permits, variances, environmental assessments, deed restrictions, or other legal assurances in a timely fashion. Are there any known or potential barriers/impediments to project implementation? ▼

No permitting, variances, or other approvals are required for this project, and there are no known barriers to completing this work in a timely fashion.

Will this project be phased and require funding over multiple years? If so, please provide a timeline and anticipated funding requirements. Understand that there is no guarantee that funding will be available for multiple years. ▼

The proposed project will not be phased and will not require funding beyond the anticipated one-year grant period. It is estimated that final plans and specifications will be delivered to Historic New England in early 2025.

How would denial of CPA funding or a partial funding award affect the viability of your project? ▼

Please see extended narrative responses attached.

Is your project going to require ongoing maintenance? If yes, outline the plan and budget, identify the source of funding, and who will be responsible for ongoing oversight. The CPC cannot fund the maintenance costs for any CPA projects. ▼

The proposed project will not result in any new maintenance costs. Historic New England budgets approximately \$9,000 annually for basic maintenance practices at Browne House, with additional project-specific funding applied through each budget. This does not include the staff time of our regional landscape manager; the time of our regional property manager who oversees all maintenance and project work; or the time of our staff carpentry crew who may be called upon to support general preservation repairs or emergency response work.

APPLICATION ATTACHMENTS

Attach all of the documents listed in the Submission Requirements Checklist applicable to this application.

I (we) certify that all information provided in this submission is true and correct to the best of my (our) knowledge and that no information which might reasonably affect funding has been excluded. I (we) authorize the Community Preservation Committee and/or the City of Watertown to obtain verification from any source provided.

Katherine Pomplun

CHECK HERE
TO CERTIFY 

▲ NAME

Describe the project and how you plan to accomplish it.*

Historic New England respectfully requests a grant from the Watertown Community Preservation Committee in support of our proposed project: the development of plans and specifications for structural repairs at Browne House.

Browne House, our c.1698 house museum in Watertown, features a rare seventeenth-century framing style in which beams are framed in a “transverse” or “cross-wise” direction and not tied into posts or a chimney wall. In 2020, Historic New England staff discovered that an attic-supporting beam on the second floor had cracked, and temporary post shores were installed on all levels of the building to ensure its stability while the crack was monitored and potential causes were investigated. A Structural Condition Assessment Report (*Simpson Gumpertz & Heger*, attached) was obtained in 2023 that describes the current conditions in detail and concludes that the compromised beam must be repaired.

Before we can pursue repair and resolve Browne House’s structural deficiencies, Historic New England must engage a qualified structural engineer to provide detailed plans and specifications for the project. The engineer’s scope of work will include:

- Providing 50% construction documents for three potential repair solutions
 - Working with Historic New England’s property care staff to evaluate the methods, materials, and costs proposed for each solution
- Delivering 100% construction documents for the chosen solution, to be used for the future repair project

Completing this planning effort will position Historic New England to execute the needed repairs in a timely fashion, while ensuring that the chosen methods for repair will be both effective and sensitive to the historic integrity of Browne House.

How does this project meet the general priorities and specific funding category goals outlined in the CP Plan?*

The proposed project addresses Historic Preservation Goal #2: “Support the preservation of privately-owned historic resources that demonstrate appropriate public benefit as required under the law.” More broadly, the project is aligned with the CPC’s prioritization of sustainable projects that support a resource’s long-term maintenance, projects that demonstrate support, and projects that leverage matching funds for a reasonable and feasible project budget and scope.

Preservation of Browne House is also aligned with Watertown’s recently adopted Comprehensive Plan, which directs policymakers and city departments to “Support community wellness through inclusive programs and events, diverse arts and culture, enhanced natural and historic resources, and livelier public and private spaces.” The plan recommends the following strategy to advance this goal: “Promote local history and historic resources as a way to tell Watertown’s story and enrich the public realm.” Supporting the continued preservation of Browne House will ensure that Historic New England can continue to share its interpretation of the site and the story of Watertown with Watertown residents through the lens of the Browne family’s three centuries of occupancy.

Why is this project needed and what are the public benefits? Who will be served by this project? (e.g. particular demographic population or city district)*

As depicted in the attached photos of current site conditions, cracking and deficiencies in the building's framing system threaten the structural integrity of Browne House. The proposed project – the development of repair plans and specifications by a qualified structural engineer – is needed to ensure that we select the most appropriate and effective method to resolve these threats and then implement repairs that will reinforce the structure and ensure its long-term survival.

As a public historic site and the oldest house in Watertown, the c. 1698 Browne House is an irreplaceable cultural resource. Its location on Main Street next door to the Watertown Police Department makes it highly visible, and the museum is open to the public on weekends March-November. Acquired by Historic New England's founder in 1919, the house was painstakingly restored in what is acknowledged to be the first fully documented historic restoration in America. Today, visitors can see an impressive amount of surviving seventeenth-century details – including a three-light casement window and rare wrought-iron hardware – uncovered as part of that restoration. Museum admission is always free for Watertown residents.

Have you sought input or support from any boards, commissions, committees, community groups, or individuals? If so, please provide details.*

Historic New England presented the proposed project to the Watertown Historical Commission on September 14, 2023. A letter of support for the project was submitted to the Community Preservation Committee by Chair Elise Loukas.

Historic New England also contracted with structural engineers Simpson Gumpertz & Heger to obtain a Structural Conditions Assessment Report, which includes detailed analysis of the existing structural problems and was used to further define the scope of work for the proposed project.

How does this project incorporate universal design and comply with accessibility regulations (ADA/MAAB)?*

The proposed planning project will not affect accessibility at Browne House but could lead to improvements when repairs are later implemented, as the post shores that currently support the framing obstruct visitor circulation in the museum spaces. These will be removed once the framing is sufficiently reinforced. To accommodate visitors who are unable to access interior spaces on the second floor, Historic New England has created a detailed virtual tour of Browne House using Matterport technology (my.matterport.com/show/?m=o5zZ9ogUVQX). Our work to improve the accessibility of our sites and programs is driven by a staff accessibility task force and summarized in our commitment statement at www.historicnewengland.org/accessibility.

How does this project incorporate environmental sustainability?*

Historic New England's property care team evaluates all project planning at our historic sites through a sustainability and climate resiliency lens. For the proposed project at Browne House, the structural engineer will present multiple options for repair, and staff will ultimately identify and select the solution that best resolves Browne House's structural deficiencies while ensuring the use of sustainable construction materials and preservation strategies that are sensitive to existing historic fabric.

Describe the qualifications and experience of key project professionals: project manager, design professionals, and other key consultants participating to successfully complete the project.*

Historic New England intends to engage the structural engineering firm Simpson Gumpertz & Heger to design the plans and specifications for repair at Browne House. Project work will be coordinated by Principal Matthew Bronski, whose twenty-eight years of experience at SGH includes many projects on highly significant historic buildings and prior work with Historic New England's property care team.

Describe the roles, responsibilities, and time allocation of team members involved in the project. For example: who will manage the finances, who will oversee the project scope, and who will maintain the resource after project completion?*

Historic New England's property care team has extensive experience with capital improvements, planning studies, and the successful management of grant-funded projects. Jodi Black, supervising preservation manager, has fifteen years of experience with Historic New England and will oversee the project scope and budget. Katherine Pomplun, institutional giving officer, will ensure compliance with all grant terms and reporting requirements. Detailed financial and project management systems are in place to ensure timely and effective project completion. Preservation and maintenance for all Historic New England properties is managed by our fifteen-person property care team, led by Team Leader Benjamin Haavik since 2004.

Outline the project timeline, including the milestones and key steps necessary to successfully complete the project. (Note: CPA funding disbursements and project reporting may correspond to these milestones.)*

The project is expected to proceed as follows:

Before or by:

June 1, 2024	Notification of CPA funding decisions; grant contracts signed
July 1, 2024	Engage structural engineer
September 30, 2024	Engineer submits 50% Construction Level documents for three potential repair solutions

November 30, 2024	Historic New England property care staff evaluates each solution and obtains cost estimates for implementation
December 31, 2024	Historic New England selects a repair solution in consultation with engineer
February 28, 2025	Engineer submits 100% Construction Level documents for the selected repair
March 31, 2025	Final reporting and close-out of CPA grant

Detail your process for obtaining required permits, variances, environmental assessments, deed restrictions, or other legal assurances in a timely fashion. Are there any known or potential barriers/impediments to project implementation?*

No permitting, variances, or other approvals are required for this project, and there are no known barriers to completing this work in a timely fashion.

Will this project be phased and require funding over multiple years? If so, please provide a timeline and anticipated funding requirements. Understand that there is no guarantee that funding will be available for multiple years.*

The proposed project will not be phased and will not require funding beyond the anticipated one-year grant period. It is estimated that final plans and specifications will be delivered to Historic New England in early 2025.

How would denial of CPA funding or a partial funding award affect the viability of your project?*

If denied funding or awarded a partial grant for this project, Historic New England would attempt to identify other grant opportunities or sources of revenue that might allow the project to take place in our next fiscal year as planned. We expect this would be challenging, as many funders that support construction and repair projects exclude planning as an eligible cost. We are grateful that the Watertown Community Preservation Committee sees the value in funding planning efforts that ultimately result in better outcomes for the resources involved.

Browne House has a small endowment that generates approximately \$1,100 annually for its care and maintenance, and expenses for Browne House beyond that amount are supported by the operating budget and additional fundraising. Historic New England has invested significantly in Browne House in recent years. In 2021, we completed a \$300,000 project (supported in part by a \$50,000 grant from the Massachusetts Historical Commission) to restore the property's mid-nineteenth-century barn. The project included structural repairs to the sills, posts, girts, and roof framing; replacing the roof and flashing; replacing the gutters; and installing new cladding. We have also been met with unexpected budget impacts at Browne House: an additional \$300,000 in expenditures were incurred in 2022-23 after a fuel oil spill on site required emergency response, clean-up, and mitigation actions.

Is your project going to require ongoing maintenance? If yes, outline the plan and budget, identify the source of funding and who will be responsible for ongoing oversight. The CPC cannot fund the maintenance costs for any CPA projects.*

The proposed project will not result in any new maintenance costs. Historic New England budgets approximately \$9,000 annually for basic maintenance practices at Browne House, with additional project-specific funding applied through each budget. This does not include the staff time of our regional landscape manager; the time of our regional property manager who oversees all maintenance and project work; or the time of our staff carpentry crew who may be called upon to support general preservation repairs or emergency response work.

CPA APPLICATION BUDGET

Browne House Structural Engineering

▲ PROJECT NAME

The Society for the Preservation of New England Antiquities d/b/a Historic New England

▲ PROJECT APPLICANT

Project Budget Summary

TOTAL PROJECT COST	CPA FUNDS REQUESTED	OTHER FUNDING (NON-CPA FUNDS)	OTHER FUNDS % OF TOTAL PROJECT COST
\$ 14500	\$ 7250	\$ 7250	% 50

Status of Non-CPA Funding

Please include documentation of funding with this application.

SOURCE	APPLICATION DATE	AMOUNT	TYPE (CASH, IN-KIND)	STATUS OF FUNDING				
				PROPOSAL TO BE SUBMITTED	PENDING	REQUEST DENIED	COMMITMENT RECEIVED	FUNDS ON HAND
Historic New England Operating Budget	N/A	7250	Cash					7250
								7250
								7250

Project Budget

Please include an itemized budget at a level of detail commensurate with the project complexity.

CATEGORY	ITEM	CPA FUNDS REQUESTED	OTHER FUNDS	HOW COST WAS ESTIMATED (E.G. PROFESSIONAL QUOTE)*	TOTAL
Professional Fees	Engineering Services	7250	7250	Professional estimate submitted by SGH	14500
Construction					
Equipment					
Labor					
Materials					
Supplies					
Other (explain)					

*Note: Please remember to review state procurement laws as applicable to your project.

Maintenance Budget

Year 1	Year 2	Year 3	Year 4	Year 5
\$ n/a	\$ n/a	\$ n/a	\$ n/a	\$ n/a

6 October 2023

Ms. Jodi Black
Supervising Preservation Manager
Historic New England
151 Essex Street
Haverhill, MA 01832

Re: Continued Structural Design Services, Browne House, 562 Main Street,
Watertown, MA

Dear Ms. Black:

Thank you for considering Simpson Gumpertz & Heger Inc. (SGH) to provide continued structural engineering design services to repair the existing attic-floor beam.

1. BACKGROUND

We base our understanding of the project on observations made during our 30 August 2023 site visit. Our 8 September 2023 structural condition assessment report, issued following our site visit, includes the following five concept-level repair recommendations:

- Repair Recommendation #1** Remove and replace the approximate 3 ft section of the attic beam, recreating the original scarf joint.
- Repair Recommendation #2** Remove and replace the existing attic beam with a new wood beam. The new wood beam will match the existing beam's size and material and span the house's full width (~18 ft) without requiring a scarf joint.
- Repair Recommendation #3** Remove and replace the existing attic beam with a new engineered multi-ply LVL wood beam that spans the entire width of the house (~18 ft).
- Repair Recommendation #4** Strengthen the existing attic beam by sistering engineered LVL members to each side of the existing beam for the entire length of the existing beam.
- Repair Recommendation #5** Replace the temporary post shore with a permanent post shore that extends down through the full height of the building to grade.

You informed us that you want to explore Repair Recommendations #1, #2, and #5 further.

2. PROJECT SCOPE OF WORK

2.1 50% Construction Document

- Provide 50% Construction Level structural documents for the three repair recommendations you selected. We understand that you will use these documents to develop pricing for the three repair recommendations. You will select the repair you intend to install following the pricing exercise.
- Review and comment on cost estimates by the cost estimating consultant or construction manager for the items shown on the structural documents. We include one virtual meeting with you to review these costs. We assume you will select a repair you intend to install following this cost-estimating phase.

2.2 100% Construction Document

- Provide 100% Construction Level structural documents (PDF format) for the repair selected at the end of the cost-estimating phase. We will provide signed and sealed structural drawings for the permit application.
- Provide General Notes on the structural drawings that provide technical specifications for materials and workmanship . There will not be a separate specification book.

2.3 Construction Adminstration

- Provide design affidavit (structural) for permit application.
- Provide a final affidavit (structural) at the conclusion of the construction phase.
- Participate in a pre-installation meeting at the site to review the structural scope of work with the contractor you retained to install the repair.
- Review shop drawings for the work shown on the structural drawings for general conformance with the design intent.
- Answer questions (RFIs) relative to the work shown on the structural drawings.
- Make periodic visits to observe the general progress of the construction shown on the structural drawings; one trip to the site is included herein as part of the basic structural engineering services.
- Provide construction observation reports for each visit to the site.

3. ADDITIONAL SERVICES

SGH will provide additional services if requested and approved. Additional services are all services that are not part of the basic structural engineering services. They are either services arising from unforeseen circumstances during design and construction or optional services not necessary for the attic beam repair design. They include, but are not limited to :

- Special Inspection and Tests: The current edition of the Massachusetts Building Code requires the Owner to hire an Inspection Agency to implement the Special Inspect and Test Program (SITP) prepared by the Structural Engineer of Record, maintain the records and the inspection, and submit periodic and final reports the Building Official. The cost of this effort should be included in the Owner's construction testing budget for the project. The cost of the SITP program will depend on factors not yet known, such as construction material, construction details, construction schedule, and contractor performance. If the Owner desires it, after design, we will be happy to develop a fee to administer the SITP, engage inspectors, and serve as the Inspection Agency; however, we are comfortable with the Owner choosing another entity to serve as the Inspection Agency.
- Preparation of archival or record drawings after completion of the project. These would be the structural contract drawings updated to include any sketches developed by our office during construction. These may be hand or digital sketches. Hand sketches with the project title block will be scanned and incorporated into the contract drawing.
- Redesign the new structure after issuance of the 100% Construction Documents to address modification resulting from a value engineering exercise.
- Redesign of the new structure due to construction variation from design tolerances or unanticipated hidden conditions discovered during construction.
- Redesign of the new structure to address the contractor's request for substitutions or to address deviation from the Contract Documents made by the contractor during the construction phase.
- Additional site visits beyond those included under the basic services.

4. BASIC SERVICE FEE

Our fee for the services described above for this project will be \$14,500. Our fees for additional services will be computed on an hourly basis, as shown on the attached Fee Schedule and Payment Terms. SGH will bill direct expenses at actual cost plus 10%. Direct expenses are out-of-pocket expenses and include, but are not limited to, travel, copying, and charges for the use of SGH field and laboratory equipment and specialized computer software.

This proposal is valid for sixty days. Our proposed agreement consists of this proposal and the enclosed Contract Provisions, Fee Schedule, and Payment Terms. If acceptable, please sign and return one copy of this letter.

Sincerely yours,
SIMPSON GUMPERTZ & HEGER INC.



Erik W. Farrington, P.E.
Principal
MA License No. 41508



Michael A. Peddie
Senior Project Consultant

Accepted: HISTORIC NEW ENGLAND

Signature: _____

Printed Name: _____

Title: _____

Date: _____

EWf/mlp (BO23-0003342-EWF)
0101C23 010617-CP-2
Encls.

**SIMPSON GUMPERTZ & HEGER INC.
FEE SCHEDULE AND PAYMENT TERMS**

<u>Personnel Category</u>	<u>Hourly Billing Rate</u>
Senior Principal	\$375
Principal	\$355
Associate Principal	\$315 – \$335
Project/Technical Director	\$275 – \$325
Senior Technical Manager	\$250
Senior Project Manager	\$285 – \$310
Senior Project Supervisor	\$255 – \$280
Senior Consulting Architect/Engineer	\$235 – \$260
Consulting Architect/Engineer	\$195 – \$220
Senior Project Consultant	\$240 – \$245
Project Consultant II	\$200
Project Consultant	\$175 – \$190
Associate Project Consultant	\$155
Technical Aide	\$100
Senior Laboratory Technician	\$155 – \$185
Laboratory Technician	\$145
Senior Graphics Specialist	\$260
Graphics Specialist II	\$195
Graphics Specialist	\$145
Senior BIM Technician II/Senior Project Drafter	\$200
Senior BIM Technician I/Senior Project Drafter	\$180
BIM Technician II/Senior Drafter	\$160
BIM Technician I/Drafter	\$130
Non-Technical	\$120 – \$140

Rates are in US dollars. Where ranges of hourly rates are shown for a single title, they reflect the varying rates of the particular individuals with that title. An annual rate adjustment, based upon salary increases, will apply on 1 January each year.

CONTRACT PROVISIONS

1. **CONTRACT** – These Contract Provisions and the accompanying Proposal and Fee Schedule constitute the entire Agreement of the parties, and supersede all prior negotiations, agreements, and understandings with respect to the subject matter of this Agreement. These Contract Provisions shall take precedence over any inconsistency or contradictory provisions contained in any proposal, contract, purchase order, requisition, notice to proceed, or like document. The parties may only amend this Agreement by a written document duly executed by both parties.
2. **RIGHT OF ENTRY** – When entry to property is required by the work, the Client agrees to obtain legal right-of-entry on the property.
3. **DOCUMENTS** – All reports, notes, drawings, specifications, data, calculations, and other documents prepared by SGH are instruments of SGH's service that shall remain SGH's property. The Client agrees not to use SGH-generated documents for marketing purposes or for projects other than the project for which the documents were prepared by SGH without SGH's prior written permission.

Any reuse or disbursement to third parties without such express written permission or project-specific adaptation by SGH will be at the Client's sole risk and without liability to SGH or its subsidiaries, independent professional associates, subconsultants, and subcontractors. Accordingly, the Client shall, to the fullest extent permitted by law, defend, indemnify, and hold harmless SGH from and against any and all costs, expenses, fees, losses, claims, demands, liabilities, suits, actions, and damages whatsoever arising out of or resulting from such unauthorized reuse or disbursement. Any release or project-specific adaptation by SGH will entitle SGH to further compensation at rates to be agreed upon by the Client and SGH.

4. **DISPOSAL OF SAMPLES** – SGH will discard samples upon completion of the work covered under this Agreement, unless the Client instructs otherwise in writing.
5. **HAZARDOUS MATERIALS** – The scope of SGH's services for this Agreement does not include any responsibility for detection, remediation, accidental release, or services relating to waste, oil, asbestos, lead, or other hazardous materials, as defined by Federal, State, and local laws or regulations.
6. **CONSTRUCTION SERVICES** – When construction-phase services are included in the Agreement, SGH will provide personnel to evaluate whether construction is in general accordance with the construction contract, but not to perform detailed observations or inspections of the work.

SGH is not a guarantor or insurer of the contractor's work; the contractor is solely responsible for the accuracy and adequacy of construction and for all other activities performed by the contractor, including the means and methods of construction; supervision of personnel and construction; control of machinery; false work, scaffolding, and other temporary construction aids; safety in, on, and about the job site; and compliance with OSHA and all other applicable regulations. SGH's evaluation of the contractor's performance will not include review or observation of the adequacy of the contractor's safety measures or of safety conditions on the project site nor of Contractor's means or methods of construction.

7. **STANDARD OF CARE** – SGH and its subsidiaries, independent professional associates, subconsultants, and subcontractors will exercise that degree of care and skill ordinarily practiced under similar circumstances by engineers and architects providing similar services. The Client agrees that services provided by SGH will be rendered without any warranty, express or implied.

SGH shall exercise usual and customary professional care in its efforts to comply with codes, regulations, laws rules, ordinances, and such other requirements in effect as of the date of execution of this Agreement.

The Client agrees that SGH has been engaged to provide technical professional services only, and that SGH does not owe a fiduciary responsibility to the Client.

8. **OPINION OF PROBABLE COSTS** – When required as part of our work, SGH will furnish opinions of probable cost but does not guarantee the accuracy of such estimates. Opinions of probable cost, financial evaluations, feasibility studies, economic analyses of alternate solutions, and utilitarian considerations of operations and maintenance costs prepared by SGH hereunder will be made on the basis of SGH's experience and qualifications and will represent SGH's judgment as an experienced and qualified design professional. SGH does not have control over the cost of labor, material, equipment, or services furnished by others or over market conditions or contractors' methods of determining prices or performing the work.

9. **SUSPENSION OF WORK** – The Client may, at any time, by written notice, suspend further work by SGH. The Client shall remain liable for, and shall promptly pay SGH for all services rendered to the date of suspension of services plus suspension charges. Suspension charges shall include the cost of assembling documents, personnel and equipment rescheduling or reassignment, and commitments made to others on the Client's behalf. If after ninety (90) days the Client resumes SGH's work on the Project, SGH and the Client shall renegotiate SGH's fee.

If payment of invoices by the Client is not maintained current, SGH may, upon written notice to the Client, suspend further work until payments are brought current. The Client agrees to indemnify and hold SGH harmless from any claim or liability resulting from such suspension.

10. **TERMINATION** – The Client or SGH may terminate this Agreement for cause, except only the Client may terminate for convenience. The party initiating termination shall so notify the other party. The Client shall compensate SGH for services performed prior to termination and for prior authorized commitments made by SGH on the Client's behalf.

11. **CHANGES OR DELAYS** – Unless the accompanying Proposal provides otherwise, the proposed fees constitute SGH's estimate to perform the services required to complete the Project. Required services often are not fully definable in the initial planning; accordingly, developments may dictate a change in the scope of services to be performed. Where this occurs, changes in the Agreement shall be negotiated and an equitable adjustment shall be made. In addition, costs and schedule commitments shall be subject to renegotiation for unreasonable delays caused by the Client's failure to provide specified facilities, direction, or information.

12. **FORCE MAJEURE** – SGH will not be liable to the Client for delays in performing its Services or for direct or indirect costs resulting from such delays that may result from labor strikes, riots, war, acts of governmental authorities, extraordinary weather conditions or other natural catastrophes, or any other cause beyond the reasonable control or contemplation of either party.

13. **LIABILITY** – SGH will furnish appropriate insurance certificates for general and professional liability upon request. The Client agrees that SGH's total liability to the Client and the total liability to the Client of SGH's principals, officers, agents, and employees, for any and all injuries, claims, losses, expenses, or damages whatsoever, including attorney's fees, arising out of or in any way related to the Project or this Contract from any cause or causes, including, but not limited to, SGH's negligence, errors, omissions, strict liability, breach of contract, or breach of warranty shall not exceed SGH's total fee under this Agreement or \$50,000, whichever is greater. In no event shall SGH be liable to Client for any indirect, incidental, special or consequential damages whatsoever (including but not limited to lost profits or interruption of business) arising out of or related to the services provided under the Agreement.

14. **CONFLICTS OF INTEREST** – This assignment may presently or in the future involve parties with potentially adverse interests to those of SGH's existing or future clients ("Affected Parties" or "Affected Party"). Prior to SGH's acceptance of this assignment, SGH will make reasonable attempts to identify any Affected Parties based on information SGH has in its possession from the Client and any Affected Parties and SGH's search of its project and proposal databases. To the extent that SGH identifies a relationship with an Affected Party, SGH will inform the Client as to the identity of such parties. Client agrees to allow SGH to release to any Affected Parties the fact of SGH's engagement by the Client and any other information required to evaluate any potential conflict.

SGH's ability to inform the Client of a relationship with an Affected Party is limited by the thoroughness and accuracy of the information provided to SGH by the Client and any Affected Parties, and by SGH's limitations in reasonably and diligently discovering all relationships with Affected Parties. Regardless of SGH's relationship with an Affected Party, and, provided such relationship with an Affected Party does not arise from SGH's willful disregard of a relationship with the Affected Party, SGH shall be entitled to payment for all services rendered to the date of discovery or notice, whichever occurs first, of a relationship between SGH and an Affected Party. SGH does not guarantee that a relationship between the Client and an Affected Party, which may be perceived by the Client as a conflict, will not arise during the course of an assignment or thereafter. SGH disclaims responsibility for such occurrences and to the fullest extent permitted by law, the Client agrees to waive any claim against SGH arising out of any such actual or potential conflict-related occurrences. Subsequent to the date of this Agreement, SGH will not be in a position to guaranty that it can advise the Client of any future Affected Parties or perceived or actual conflict circumstances that may arise, but will endeavor to notify Client of such situations.

15. **INDEMNIFICATION** – SGH shall, subject to the limitation of liability contained in Section 13, indemnify the Client for any loss or damage caused solely by the professional negligence of SGH in performance of the services under this Agreement.

16. MISCELLANEOUS

Governing Law: The laws of the state in which the Project is located shall govern the validity and interpretation of this Agreement.

Invalid Terms: If any of these Contract Provisions shall be finally determined to be invalid or unenforceable in whole or in part, the remaining provisions hereof shall remain in full force and effect and be binding upon the parties. The parties agree to reform the contract between them to replace any such invalid or unenforceable provision with a valid and enforceable provision that comes as close as possible to the intention of the stricken provision.

SGH Reliance: Unless otherwise specifically indicated in writing, SGH shall be entitled to rely, without liability, on the accuracy and completeness of information provided by the Client, the Client's consultants and contractors, and information from public records, without the need for independent verification.

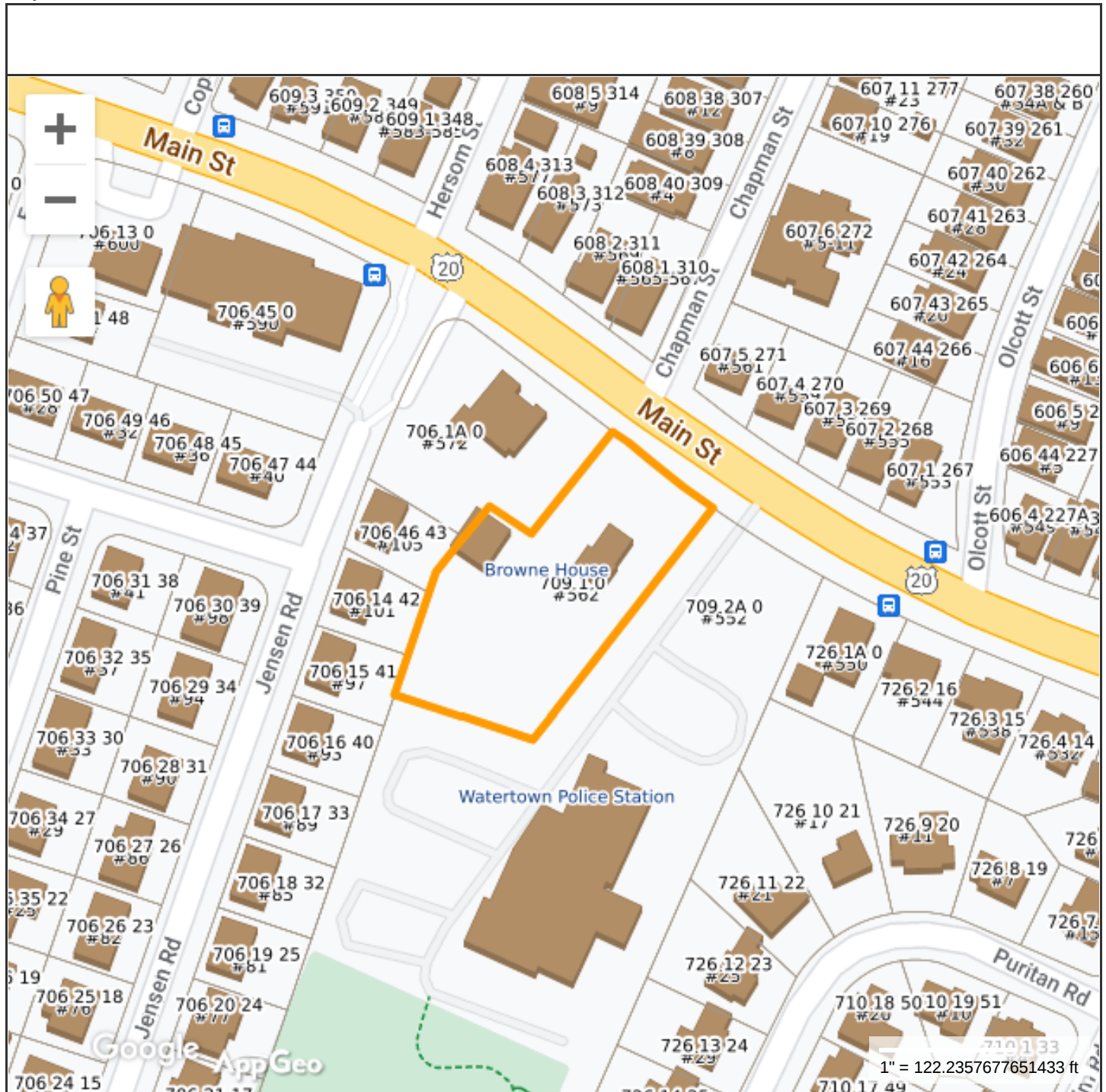
Copyright Infringement Indemnification: To the fullest extent permitted by law, the Client agrees to defend, indemnify, and hold harmless SGH from any and all claims, damages, suits, causes of action, liabilities or costs, including reasonable attorneys' fees and costs of defense, arising out of or in any way connected with SGH's use of documents or designs prepared by the Client's consultants, that may be asserted against or incurred by SGH.

Certifications: SGH shall not be required to sign any documents, no matter by whom requested, that would result in SGH's having to certify, guaranty, or warrant the existence of conditions that SGH cannot ascertain.

Payment: Invoices will be submitted periodically, and are due and payable upon receipt. Unpaid balances shall be subject to an additional charge at the rate of 1-1/2% per month from the date of invoice if the unpaid balance is not paid within thirty (30) days. The Client shall reimburse SGH for all attorney's fees and costs related to collection of overdue payments.

Litigation: All costs and labor associated with compliance with any subpoena or other official request for documents, for testimony in a court of law (other than in connection with expert witness services), or for any other purpose relating to work performed by SGH, in connection with work performed for the Client, shall be paid by the Client as a direct expense (actual cost plus 10%).

Taxes: Client shall, in addition to the other amounts payable under this Agreement, pay, on a timely basis, all sales, use, value added or other taxes, federal, state or otherwise, however designated (hereinafter "Taxes"), which are levied or imposed by reason of the transactions contemplated by this Agreement or any of the Services, except for taxes on SGH's net income. Client shall promptly pay SGH for any Taxes actually paid by SGH on behalf of Client, or which are required to be collected or paid by SGH. SGH may bill Client separately for such Taxes.



Property Information

Property ID 709 1 A
Location 562 MAIN ST
Building Value 354,600
Land Value 506,300
Total Value 878,700

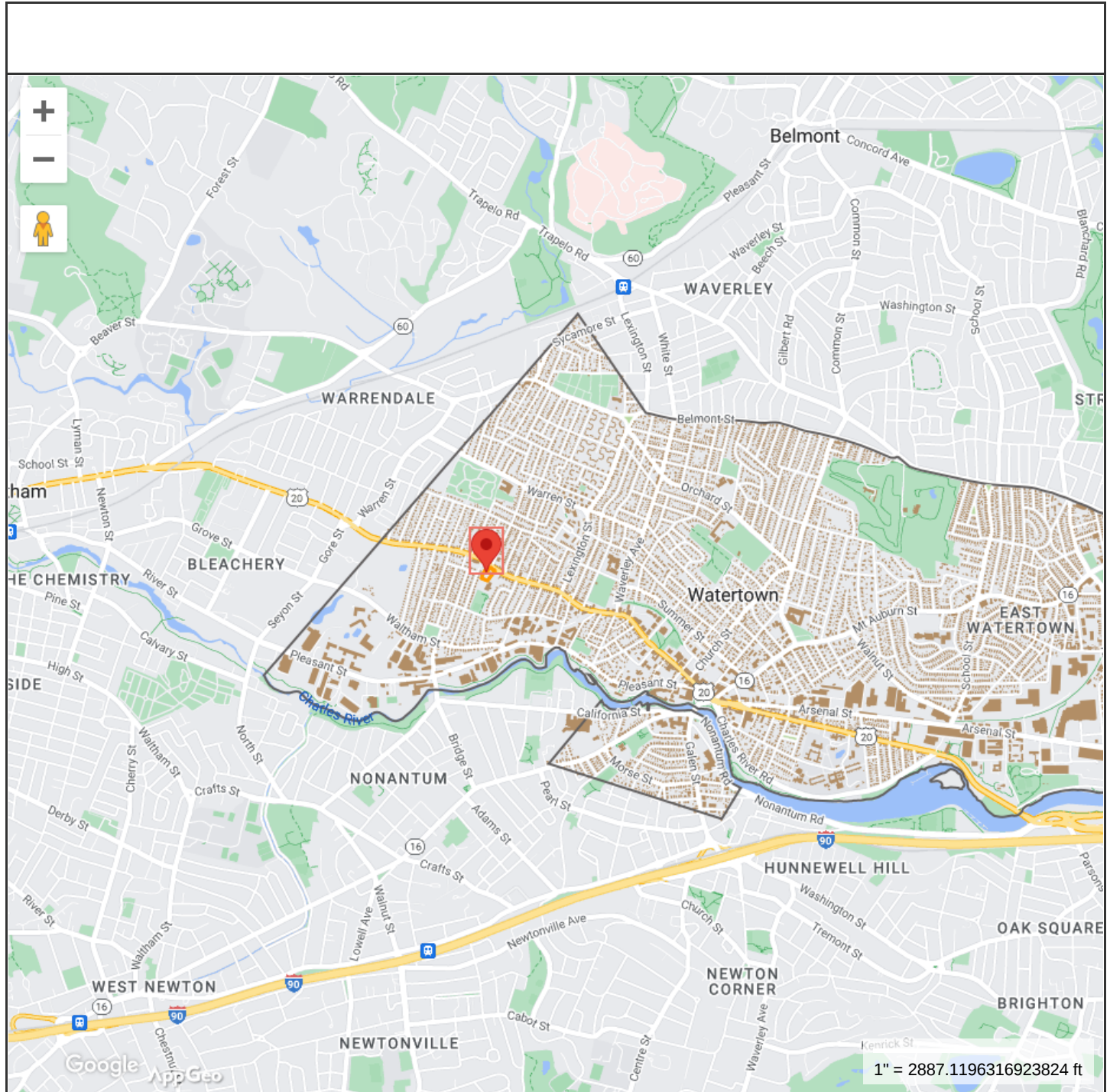


MAP FOR REFERENCE ONLY NOT A LEGAL DOCUMENT

City of Watertown, MA makes no claims and no warranties, expressed or implied, concerning the validity or accuracy of the GIS data presented on this map.

Geometry updated 01/17/2023
 Data updated Daily

Print map scale is approximate. Critical layout or measurement activities should not be done using this resource.

**Property Information**

Property ID 709 1 A
Location 562 MAIN ST
Building Value 354,600
Land Value 506,300
Total Value 878,700

**MAP FOR REFERENCE ONLY
NOT A LEGAL DOCUMENT**

City of Watertown, MA makes no claims and no warranties, expressed or implied, concerning the validity or accuracy of the GIS data presented on this map.

Geometry updated 01/17/2023
Data updated Daily

Print map scale is approximate.
Critical layout or measurement
activities should not be done using
this resource.



ments

Page 20 of 209













STRUCTURAL CONDITION ASSESSMENT REPORT				
Report By:	Michael A. Peddie and Erik W. Farrington, P.E.			
Date of Site Visit:	30 August 2023			
Date Report Issued:	8 September 2023			
Project No./Keyword:	231218	BEAM	Purpose: Document the condition of the existing framing in the vicinity of the attic beam splice.	
Project Name:	Browne House, Structural Condition Assessment			
Meeting/Work Location:	Site	Time – from: 10:00 a.m. to: 11:00 a.m.		
Weather:	Cloudy and raining	Ambient Temperature: 65°F		
Persons Contacted:	Ms. Jodi Black (Historic New England)			
Distribution:	Ms. Jodi Black (Historic New England)			
<i>This report is limited. The following items are based on brief and limited observations of certain selected locations; all similar locations may not have been observed. Other issues of equal or greater importance may not be addressed in this report. Recommendations included in this report are for consideration by the project team and are not construction change directives.</i>				

Michael A. Peddie of Simpson Gumpertz & Heger Inc. (SGH) visited the above-referenced project on 30 August 2023 to observe and document the condition of the existing attic floor structure in the vicinity of the shored attic floor beam. We met with Jodi Black of Historic New England while on site.

1. BACKGROUND

Before our site visit, the Browne House maintenance staff installed a crack gauge near the scarf joint in the attic floor beam to monitor ongoing movement. In addition to the crack gauge, the maintenance staff installed temporary wood post shoring under the scarf joint and through the height of the house to the basement floor. Ms. Black requested that we observe and document the condition of the existing attic floor framing supported on the beam to determine the potential cause for the ongoing movement and provide concept-level repair options (if necessary).

2. OBSERVATIONS

The attic floor framing consists of the following:

- Wood floor plank spanning 22 in. in the north-south direction to 3 in. wide x 4.5 in. deep attic floor joists. The floor joists span approximately 9.25 ft east-west to an interior wood beam. The ends of the joists are mortised into the sides of the interior wood beam.
- The 10.5 in. deep x 10 in. wide wood beam spans in the north-south direction approximately 18 ft. (the width of this portion of the house).

- There is a scarf joint (stop-splayed and tabled scarf joint with key) in the attic beam at approximately 3.2 ft from the south end of the beam.

We include specific observations and photos in the table below.

Item	Photo	Observations
Attic Framing	Photo 1 (Attic Framing Post Shore) 	The Browne House maintenance staff installed a temporary post shore below the attic beam. The post shore aligns with the beam scarf joint approximately 3.2 ft from the south end of the attic beam (Photo 1).
	Photo 2 (Second Floor Framing Post Shore) 	

Item	Photo	Observations
	Photo 3 (West Side of Attic Beam at Scarf Joint with Crack Gauge) 	The Browne House maintenance staff installed a crack gauge on the west side of the attic beam at the scarf joint. The gauge straddles a crack in the upper portion of the scarf joint, where an attic joist frames into the beam by way of a mortise-tenon connection. The crack appears to extend the full width of the beam. (Photo 3 shows the west side. Photo 4 shows the east side). Assuming the crack gauge was installed at the zero mark, the gauge indicates that the crack has grown ~3 mm.
	Photo 4 (East Side Attic Beam at Scarf Joint) 	

Item	Photo	Observations
	Photo 5 (Ends of Joists on West side of Attic Beam)  Photo 6 (Ends of Joists at Second Floor) 	The attic beam is rotated (the top is displaced horizontally to the east, and the bottom of the beam is displaced horizontally to the west). The ends of the joists that frame to the west side of the beam are pulling out of the mortise joints in the side of the beam (Photo 5). A similar condition exists at the ends of the second-floor joists that frame to the side of the second-floor beam (Photo 6)

3. DISCUSSION

The crack gauge indicates that the crack in the scarf joint has grown since the gauge was installed. The movement recorded by the gauge is most likely the result of instability in the scarf joint caused by the full-width crack in the upper portion of the scarf joint. Repairs to the compromised attic beam are needed. The rotation of the attic beam causes some reduction of bearing of the joists in the beam mortises. This most likely occurred over the life of the building and does not appear to be directly related to movement, or damage, of the scarf joint recorded by the crack gauge. Any repair to the attic beam should also include supplementing the support for the displaced ends of the joists that frame to the sides of the beam at both the attic and second-floor levels.

4. CONCEPT LEVEL REPAIR RECOMMENDATIONS

Repair Recommendation #	Repair Description	Comment
1	Remove and replace the approximate 3 ft section of attic beam, recreating the original scarf joint.	Installing a new beam section and recreating the original scarf joint and maintaining the mortise and tenon connections of the joists will be difficult and will require a highly skilled carpenter with experience replicating historic timber framing.
2	Remove and replace the existing attic beam with a new wood beam. The new beam will match the size and material of the existing beam. The new beam will span the entire width of the house (~18 ft.) without requiring a scarf joint.	Ideally, a new beam would exactly replace the existing configuration. However, like Option 1, installing a new beam and maintaining the mortise and tenon connections of the joists will be difficult and will require a highly skilled carpenter with knowledge of historic timber framing. Replacing the entire length of the beam may require modern connection hardware to support the ends of the joists that frame to the side of the new beam.
3	Remove and replace the existing attic beam with a new engineered, multi-ply LVL wood beam that spans the entire width of the house (~18 ft.). The new LVL beam will be approximately the same depth as the existing beam and will be slightly wider than the width of the existing beam.	Sourcing materials will be easier for this option. Installation of the new beam will require modern connection hardware to support the ends of the joists that frame to the side of the new beam.

Repair Recommendation #	Repair Description	Comment
4	Strengthen the existing attic beam by sistering engineered LVL members to each side of the existing beam for the entire length of the existing beam.	The ends of the joists that frame to the beam will be cut back and framed to the sides of the LVL sistering members with modern connection hardware (metal joist hangers).
5	Replace the temporary post shore with a permanent post shore that extends down through the height of the building to grade.	The permanent post shore will shift slightly south along the beam to align with the crack in the upper portion of the beam splice. A concrete footing will be required at the base of the post shore at the basement.

I:\BOS\Projects\2023\231218.00-BEAM\WP\001MAPeddie-Struc Cond Asses Rpt-231218.00.00.cah.docx

**Internal Revenue Service
District Director**

Department of the Treasury

**P. O. Box 2508
Cincinnati, OH 45201**

Date: April 21, 1999

**Society for the Preservation of
New England Antiquities, Inc.
141 Cambridge St.
Boston, MA 02114-2799 410**

**Person to Contact:
Patty Dennis (31-01944)
EP/EO Customer Service Rep.
Telephone Number:
877-829-5500
Fax Number:
513-684-5936
Federal Identification Number:
04-2104937
Accounting Period Ends
March**

Dear Sir or Madam:

This is in response to your request for a letter affirming your organization's exempt status.

In May 1928, we issued a determination letter that recognized your organization as exempt from federal income tax under section 103(6) of the Internal Revenue Code of 1939 (now section 501(c)(3) of the Internal Revenue Code of 1986). That determination letter is still in effect.

We classified your organization as a publicly supported organization, and not a private foundation, because it is described in sections 509(a)(1) and 170(b)(1)(A)(vi) of the Code. This classification was based on the assumption that your organization's operations would continue as stated in the application. If your organization's purposes, character, method of operations, or sources of support have changed, please let us know so we can consider the effect of the change on the organization's exempt status and foundation status.

Your organization is required to file Form 990, Return of Organization Exempt from Income Tax, only if its gross receipts each year are normally more than \$25,000. If a return is required, it must be filed by the 15th day of the fifth month after the end of the organization's annual accounting period. The law imposes a penalty of \$20 a day, up to a maximum of \$10,000, when a return is filed late, unless there is reasonable cause for the delay.

As of January 1, 1984, your organization is liable for taxes under the Federal Insurance Contributions Act (social security taxes) on remuneration of \$100 or more the organization pays to each of its employees during a calendar year. There is no liability for the tax imposed under the Federal Unemployment Tax Act (FUTA).

Organizations that are not private foundations are not subject to the excise taxes under Chapter 42 of the Code. However, these organizations are not automatically exempt from other federal excise taxes. If you have any questions about excise, employment, or other federal taxes, please let us know.

Donors may deduct contributions to your organization as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to your organization or for its use are deductible for federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

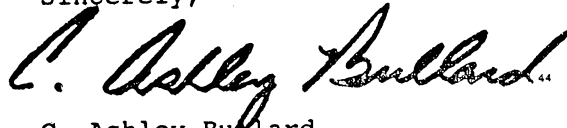
Your organization is not required to file federal income tax returns unless it is subject to the tax on unrelated business income under section 511 of the Code. If your organization is subject to this tax, it must file an income tax return on Form 990-T, Exempt Organization Business Income Tax Return. In this letter, we are not determining whether any of your organization's present or proposed activities are unrelated trade or business as defined in section 513 of the Code.

Society for the Preservation of New England Antiquities Inc
04-2104937

Because this letter could help resolve any questions about your organization's exempt status and foundation status, you should keep it with the permanent records of the organization.

If you have questions, please call us at the telephone number shown in the heading of this letter.

Sincerely,

A handwritten signature in cursive script, reading "C. Ashley Buclard". The signature is written in dark ink and is positioned above the printed name and title.

C. Ashley Buclard
District Director

Form **990**Department of the Treasury
Internal Revenue Service**Return of Organization Exempt From Income Tax**
Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

OMB No. 1545-0047

2021Open to Public
Inspection

▶ Do not enter social security numbers on this form as it may be made public.

▶ Go to www.irs.gov/Form990 for instructions and the latest information.**A** For the **2021** calendar year, or tax year beginning **APR 1, 2021** and ending **MAR 31, 2022**

B Check if applicable: ☐ Address change ☐ Name change ☐ Initial return ☐ Final return/terminated ☐ Amended return ☐ Application pending	C Name of organization SOCIETY FOR THE PRESERVATION OF NEW ENGLAND ANTIQUITIES		D Employer identification number 04-2104937
	Doing business as HISTORIC NEW ENGLAND		E Telephone number 617-994-5900
	Number and street (or P.O. box if mail is not delivered to street address)	Room/suite	
	141 CAMBRIDGE STREET		
	City or town, state or province, country, and ZIP or foreign postal code BOSTON, MA 02114-2702		G Gross receipts \$ 92,723,506.
F Name and address of principal officer: VIN CIPOLLA SAME AS C ABOVE		H(a) Is this a group return for subordinates? ☐ Yes ☒ No H(b) Are all subordinates included? ☐ Yes ☐ No If "No," attach a list. See instructions H(c) Group exemption number ▶	
I Tax-exempt status: ☒ 501(c)(3) ☐ 501(c) () (insert no.) ☐ 4947(a)(1) or ☐ 527			
J Website: ▶ HISTORICNEWENGLAND.ORG			
K Form of organization: ☒ Corporation ☐ Trust ☐ Association ☐ Other ▶		L Year of formation: 1910	M State of legal domicile: MA

Part I Summary

Activities & Governance	1 Briefly describe the organization's mission or most significant activities: WE SAVE AND SHARE NEW ENGLAND'S PAST TO ENGAGE AND INFORM PRESENT AND FUTURE GENERATIONS.		
	2 Check this box ☐ if the organization discontinued its operations or disposed of more than 25% of its net assets.		
	3 Number of voting members of the governing body (Part VI, line 1a)	3	18
	4 Number of independent voting members of the governing body (Part VI, line 1b)	4	17
	5 Total number of individuals employed in calendar year 2021 (Part V, line 2a)	5	271
	6 Total number of volunteers (estimate if necessary)	6	222
	7a Total unrelated business revenue from Part VIII, column (C), line 12	7a	-220,944.
b Net unrelated business taxable income from Form 990-T, Part I, line 11	7b	0.	
Revenue	8 Contributions and grants (Part VIII, line 1h)	Prior Year 6,251,262.	Current Year 10,490,005.
	9 Program service revenue (Part VIII, line 2g)	257,353.	546,712.
	10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)	15,744,843.	13,031,096.
	11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	26,045.	34,164.
	12 Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	22,279,503.	24,101,977.
Expenses	13 Grants and similar amounts paid (Part IX, column (A), lines 1-3)	90,993.	104,141.
	14 Benefits paid to or for members (Part IX, column (A), line 4)	0.	0.
	15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	6,663,174.	7,465,817.
	16a Professional fundraising fees (Part IX, column (A), line 11e)	0.	0.
	b Total fundraising expenses (Part IX, column (D), line 25) ▶ 743,202.		
	17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	4,448,451.	8,763,232.
	18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	11,202,618.	16,333,190.
19 Revenue less expenses. Subtract line 18 from line 12	11,076,885.	7,768,787.	
Net Assets or Fund Balances	20 Total assets (Part X, line 16)	Beginning of Current Year 154,963,761.	End of Year 149,018,347.
	21 Total liabilities (Part X, line 26)	5,648,133.	4,747,211.
	22 Net assets or fund balances. Subtract line 21 from line 20	149,315,628.	144,271,136.

Part II Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here	Signature of officer		Date		
	VIN CIPOLLA, PRESIDENT/CEO Type or print name and title				
Paid Preparer Use Only	Print/Type preparer's name BARBARA E. KING	Preparer's signature BARBARA E. KING	Date 02/08/23	Check if self-employed ☐	PTIN P00005629
	Firm's name ▶ BOLLUS LYNCH, LLP	Firm's EIN ▶ 04-3037870		Phone no. (508) 755-7107	
	Firm's address ▶ 89 SHREWSBURY STREET WORCESTER, MA 01604				

May the IRS discuss this return with the preparer shown above? See instructions ☒ Yes ☐ No

SOCIETY FOR THE PRESERVATION
OF NEW ENGLAND ANTIQUITIES

Form 990 (2021)

04-2104937 Page 2

Part III Statement of Program Service Accomplishments

Check if Schedule O contains a response or note to any line in this Part III ☐

- 1** Briefly describe the organization's mission:
WE SAVE AND SHARE NEW ENGLAND'S PAST TO ENGAGE AND INFORM PRESENT AND FUTURE GENERATIONS.
- 2** Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? ☐ Yes ☒ No
If "Yes," describe these new services on Schedule O.
- 3** Did the organization cease conducting, or make significant changes in how it conducts, any program services? ☐ Yes ☒ No
If "Yes," describe these changes on Schedule O.
- 4** Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.
- 4a** (Code:) (Expenses \$ 10,191,961. including grants of \$ 104,141.) (Revenue \$ 936,460.)
MUSEUMS - THE 39 HISTORIC PROPERTIES OWNED AND RUN BY HISTORIC NEW ENGLAND HAVE BEEN VISITED BY OVER 145,006 INDIVIDUALS. THE PROGRAMS INCLUDE EDUCATION, PUBLIC OUTREACH, AND CURATORIAL CARE FOR OVER 123,000 OBJECTS AND 1,500,000 DOCUMENTS AND PHOTOGRAPHS.
- 4b** (Code:) (Expenses \$ 3,156,954. including grants of \$) (Revenue \$)
CONSERVATION AND PRESERVATION- HISTORIC NEW ENGLAND PROVIDES PROPERTY CARE AND MANAGEMENT SERVICES FOR ALL OF THE ORGANIZATIONS HISTORIC PROPERTIES AND LANDSCAPES.
- 4c** (Code:) (Expenses \$ 319,321. including grants of \$) (Revenue \$ 93,000.)
EASEMENT PRESERVATION- HISTORIC NEW ENGLAND ADMINISTERS 118 EASEMENTS THAT PROTECT HISTORIC BUILDINGS THROUGHOUT NEW ENGLAND.
- 4d** Other program services (Describe on Schedule O.)
(Expenses \$ including grants of \$) (Revenue \$)
- 4e** Total program service expenses **13,668,236.**

Form 990 (2021)

**SOCIETY FOR THE PRESERVATION
OF NEW ENGLAND ANTIQUITIES**

Form 990 (2021)

04-2104937 Page **3**

Part IV Checklist of Required Schedules

	Yes	No
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? <i>If "Yes," complete Schedule A</i>	X	
2 Is the organization required to complete <i>Schedule B, Schedule of Contributors</i> ? See instructions	X	
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I</i>		X
4 Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? <i>If "Yes," complete Schedule C, Part II</i>		X
5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Rev. Proc. 98-19? <i>If "Yes," complete Schedule C, Part III</i>		X
6 Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? <i>If "Yes," complete Schedule D, Part I</i>		X
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If "Yes," complete Schedule D, Part II</i>	X	
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III</i>	X	
9 Did the organization report an amount in Part X, line 21, for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? <i>If "Yes," complete Schedule D, Part IV</i>		X
10 Did the organization, directly or through a related organization, hold assets in donor-restricted endowments or in quasi endowments? <i>If "Yes," complete Schedule D, Part V</i>	X	
11 If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X, as applicable.		
a Did the organization report an amount for land, buildings, and equipment in Part X, line 10? <i>If "Yes," complete Schedule D, Part VI</i>	X	
b Did the organization report an amount for investments - other securities in Part X, line 12, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VII</i>	X	
c Did the organization report an amount for investments - program related in Part X, line 13, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VIII</i>		X
d Did the organization report an amount for other assets in Part X, line 15, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part IX</i>		X
e Did the organization report an amount for other liabilities in Part X, line 25? <i>If "Yes," complete Schedule D, Part X</i>	X	
f Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? <i>If "Yes," complete Schedule D, Part X</i>		X
12a Did the organization obtain separate, independent audited financial statements for the tax year? <i>If "Yes," complete Schedule D, Parts XI and XII</i>		X
b Was the organization included in consolidated, independent audited financial statements for the tax year? <i>If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional</i>	X	
13 Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E</i>		X
14a Did the organization maintain an office, employees, or agents outside of the United States?		X
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? <i>If "Yes," complete Schedule F, Parts I and IV</i>	X	
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? <i>If "Yes," complete Schedule F, Parts II and IV</i>		X
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? <i>If "Yes," complete Schedule F, Parts III and IV</i>		X
17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? <i>If "Yes," complete Schedule G, Part I. See instructions</i>		X
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II</i>	X	
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III</i>		X
20a Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H</i>		X
b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?		
21 Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II</i>	X	

**SOCIETY FOR THE PRESERVATION
OF NEW ENGLAND ANTIQUITIES**

Form 990 (2021)

04-2104937 Page **4**

Part IV Checklist of Required Schedules (continued)

	Yes	No
22 Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III	22	X
23 Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5, about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? If "Yes," complete Schedule J	23	X
24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a	24a	X
b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	24b	X
c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?	24c	X
d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?	24d	X
25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I	25a	X
b Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I	25b	X
26 Did the organization report any amount on Part X, line 5 or 22, for receivables from or payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons? If "Yes," complete Schedule L, Part II	26	X
27 Did the organization provide a grant or other assistance to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity (including an employee thereof) or family member of any of these persons? If "Yes," complete Schedule L, Part III	27	X
28 Was the organization a party to a business transaction with one of the following parties (see the Schedule L, Part IV, instructions for applicable filing thresholds, conditions, and exceptions):		
a A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? If "Yes," complete Schedule L, Part IV	28a	X
b A family member of any individual described in line 28a? If "Yes," complete Schedule L, Part IV	28b	X
c A 35% controlled entity of one or more individuals and/or organizations described in line 28a or 28b? If "Yes," complete Schedule L, Part IV	28c	X
29 Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M	29	X
30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M	30	X
31 Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I	31	X
32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II	32	X
33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I	33	X
34 Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1	34	X
35a Did the organization have a controlled entity within the meaning of section 512(b)(13)?	35a	X
b If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2	35b	
36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2	36	X
37 Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI	37	X
38 Did the organization complete Schedule O and provide explanations on Schedule O for Part VI, lines 11b and 19?	38	X

Note: All Form 990 filers are required to complete Schedule O

Part V Statements Regarding Other IRS Filings and Tax Compliance

Check if Schedule O contains a response or note to any line in this Part V ☐

	Yes	No
1a Enter the number reported in box 3 of Form 1096. Enter -0- if not applicable	1a	90
b Enter the number of Forms W-2G included on line 1a. Enter -0- if not applicable	1b	0
c Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	1c	X

**SOCIETY FOR THE PRESERVATION
OF NEW ENGLAND ANTIQUITIES**

Form 990 (2021)

04-2104937 Page 5

Part V Statements Regarding Other IRS Filings and Tax Compliance (continued)

		Yes	No
2a Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return	2a 271		
b If at least one is reported on line 2a, did the organization file all required federal employment tax returns?	2b	X	
Note: If the sum of lines 1a and 2a is greater than 250, you may be required to e-file. See instructions.			
3a Did the organization have unrelated business gross income of \$1,000 or more during the year?	3a	X	
b If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation on Schedule O	3b	X	
4a At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	4a		X
b If "Yes," enter the name of the foreign country See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).			
5a Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?	5a		X
b Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	5b		X
c If "Yes" to line 5a or 5b, did the organization file Form 8886-T?	5c		
6a Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?	6a		X
b If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	6b		
7 Organizations that may receive deductible contributions under section 170(c).			
a Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?	7a	X	
b If "Yes," did the organization notify the donor of the value of the goods or services provided?	7b	X	
c Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?	7c		X
d If "Yes," indicate the number of Forms 8282 filed during the year	7d		
e Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	7e		X
f Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	7f		X
g If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?	7g		
h If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?	7h		
8 Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?	8		
9 Sponsoring organizations maintaining donor advised funds.			
a Did the sponsoring organization make any taxable distributions under section 4966?	9a		
b Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?	9b		
10 Section 501(c)(7) organizations. Enter:			
a Initiation fees and capital contributions included on Part VIII, line 12	10a		
b Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	10b		
11 Section 501(c)(12) organizations. Enter:			
a Gross income from members or shareholders	11a		
b Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.)	11b		
12a Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?	12a		
b If "Yes," enter the amount of tax-exempt interest received or accrued during the year	12b		
13 Section 501(c)(29) qualified nonprofit health insurance issuers.			
a Is the organization licensed to issue qualified health plans in more than one state?	13a		
Note: See the instructions for additional information the organization must report on Schedule O.			
b Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans	13b		
c Enter the amount of reserves on hand	13c		
14a Did the organization receive any payments for indoor tanning services during the tax year?	14a		X
b If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation on Schedule O	14b		
15 Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?	15		X
If "Yes," see the instructions and file Form 4720, Schedule N.			
16 Is the organization an educational institution subject to the section 4968 excise tax on net investment income?	16		X
If "Yes," complete Form 4720, Schedule O.			
17 Section 501(c)(21) organizations. Did the trust, any disqualified person, or mine operator engage in any activities that would result in the imposition of an excise tax under section 4951, 4952 or 4953?	17		
If "Yes," complete Form 6069.			

**SOCIETY FOR THE PRESERVATION
OF NEW ENGLAND ANTIQUITIES**

Form 990 (2021)

04-2104937 Page **6**

Part VI Governance, Management, and Disclosure. For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes on Schedule O. See instructions.

Check if Schedule O contains a response or note to any line in this Part VI ☒ **X**

Section A. Governing Body and Management

		Yes	No
1a Enter the number of voting members of the governing body at the end of the tax year	1a	18	
If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain on Schedule O.			
b Enter the number of voting members included on line 1a, above, who are independent	1b	17	
2 Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?	2		X
3 Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, trustees, or key employees to a management company or other person?	3		X
4 Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?	4		X
5 Did the organization become aware during the year of a significant diversion of the organization's assets?	5		X
6 Did the organization have members or stockholders?	6		X
7a Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?	7a		X
b Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?	7b		X
8 Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:			
a The governing body?	8a	X	
b Each committee with authority to act on behalf of the governing body?	8b	X	
9 Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses on Schedule O	9		X

Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

		Yes	No
10a Did the organization have local chapters, branches, or affiliates?	10a		X
b If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?	10b		
11a Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?	11a	X	
b Describe on Schedule O the process, if any, used by the organization to review this Form 990.			
12a Did the organization have a written conflict of interest policy? If "No," go to line 13	12a	X	
b Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b	X	
c Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe on Schedule O how this was done	12c	X	
13 Did the organization have a written whistleblower policy?	13	X	
14 Did the organization have a written document retention and destruction policy?	14	X	
15 Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?			
a The organization's CEO, Executive Director, or top management official	15a	X	
b Other officers or key employees of the organization	15b	X	
If "Yes" to line 15a or 15b, describe the process on Schedule O. See instructions.			
16a Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?	16a		X
b If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements?	16b		

Section C. Disclosure

17 List the states with which a copy of this Form 990 is required to be filed **MA, CT, ME, NH, RI, VT**

18 Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, and 990-T (section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.
☐ Own website ☒ Another's website ☒ Upon request ☐ Other (explain on Schedule O)

19 Describe on Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.

20 State the name, address, and telephone number of the person who possesses the organization's books and records **SOCIETY FOR THE PRESERVATION OF NEW ENGLAND ANTIQUITIES - 617-994-5962**
151 ESSEX STREET, HAVERHILL, MA 01832-5564

**SOCIETY FOR THE PRESERVATION
OF NEW ENGLAND ANTIQUITIES**

Form 990 (2021)

04-2104937 Page **7**

Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

Check if Schedule O contains a response or note to any line in this Part VII ☐

Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

1a Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
 - List all of the organization's **current** key employees, if any. See the instructions for definition of "key employee."
 - List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (box 5 of Form W-2, Form 1099-MISC, and/or box 1 of Form 1099-NEC) of more than \$100,000 from the organization and any related organizations.
 - List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
 - List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.
- See the instructions for the order in which to list the persons above.

☐ Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) VIN CIPOLLA PRESIDENT/CEO	40.00	X		X				305,322.	0.	68,772.
(2) DIANE L. VIERA EXECUTIVE VP & COO	40.00				X			193,998.	0.	22,361.
(3) JENNIFER KENT VP FOR ADVANCEMENT	40.00				X			157,933.	0.	13,915.
(4) WENDY E. GUS DIRECTOR OF FINANCE	40.00			X				127,615.	0.	22,731.
(5) DAVID DWIGGINS IT OFFICER	40.00					X		128,976.	0.	5,407.
(6) JACOB D. ALBERT TRUSTEE	2.00	X						0.	0.	0.
(7) RICHARD C. ALBRIGHT, JR. TRUSTEE	2.00	X						0.	0.	0.
(8) DEBORAH L. ALLINSON SECOND VICE-CHAIR	2.00	X		X				0.	0.	0.
(9) DAVID L. FEIGENBAUM FIRST VICE-CHAIR & CLERK	2.00	X		X				0.	0.	0.
(10) GEORGE F. FISKE, JR TREASURER	2.00	X		X				0.	0.	0.
(11) ERIC P. HAYES TRUSTEE	2.00	X						0.	0.	0.
(12) JAMES F. HUNNEWELL, JR TRUSTEE	2.00	X						0.	0.	0.
(13) GREGORY D. LOMBARDI TRUSTEE	2.00	X						0.	0.	0.
(14) DAVID A. MARTLAND CHAIR OF THE BOARD	2.00	X		X				0.	0.	0.
(15) SANDRA OURUSOFF MASSEY TRUSTEE	2.00	X						0.	0.	0.
(16) RANDY J. PARKER THIRD VICE-CHAIR	2.00	X		X				0.	0.	0.
(17) JULIE A. PORTER TRUSTEE	2.00	X						0.	0.	0.

**SOCIETY FOR THE PRESERVATION
OF NEW ENGLAND ANTIQUITIES**

Form 990 (2021)

04-2104937 Page **8**

Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(18) KRISTIN L. SERVISON TRUSTEE	2.00	X						0.	0.	0.
(19) ANGIE SIMONDS TRUSTEE	2.00	X						0.	0.	0.
(20) NANCY B. TOOKE ASSISTANT TREASURER	2.00	X		X				0.	0.	0.
(21) STEPHEN H. WHITE TRUSTEE	2.00	X						0.	0.	0.
(22) ALAN W. WONG TRUSTEE	2.00	X						0.	0.	0.
1b Subtotal								913,844.	0.	133,186.
c Total from continuation sheets to Part VII, Section A								0.	0.	0.
d Total (add lines 1b and 1c)								913,844.	0.	133,186.

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization **5**

	Yes	No
3 Did the organization list any former officer, director, trustee, key employee, or highest compensated employee on line 1a? If "Yes," complete Schedule J for such individual		X
4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? If "Yes," complete Schedule J for such individual	X	
5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? If "Yes," complete Schedule J for such person		X

Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

(A) Name and business address	(B) Description of services	(C) Compensation
M.J. MAWN INC., 595 WASHINGTON STREET, EAST WALPOLE, MA 02032	CONSTRUCTION SERVICES	329,740.
NADAAA, INC 1920 WASHINGTON STREET, BOSTON, MA 01228	ARCHITECTURAL DESIGN	146,025.
ALMAR LLC PO BOX 662, MEDFIELD, MA 02052	CONSTRUCTION SERVICES	139,025.
MURRAY MASONRY & MORE PO BOX 8454, SALEM, MA 01971	CONSTRUCTION SERVICES	127,397.
RED RIVER TECHNOLOGY LLC PO BOX 780924, PHILADELPHIA, PA 19178	IT CONSULTING	117,592.

2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization **7**

Form **990** (2021)

**SOCIETY FOR THE PRESERVATION
OF NEW ENGLAND ANTIQUITIES**

Form 990 (2021)

04-2104937 Page **9**

Part VIII Statement of Revenue

Check if Schedule O contains a response or note to any line in this Part VIII ☐

				(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512 - 514
Contributions, Gifts, Grants and Other Similar Amounts	1 a Federated campaigns	1a					
	b Membership dues	1b	463,846.				
	c Fundraising events	1c	1,217,746.				
	d Related organizations	1d					
	e Government grants (contributions)	1e	2,836,407.				
	f All other contributions, gifts, grants, and similar amounts not included above ...	1f	5,972,006.				
	g Noncash contributions included in lines 1a-1f	1g	\$ 495,535.				
	h Total. Add lines 1a-1f		10,490,005.				
	Program Service Revenue	2 a ADMISSIONS	Business Code 713990				
b							
c							
d							
e							
f All other program service revenue							
g Total. Add lines 2a-2f				546,712.			
Other Revenue		3 Investment income (including dividends, interest, and other similar amounts)			1,206,377.		
	4 Income from investment of tax-exempt bond proceeds						
	5 Royalties			9,551.			9,551.
	6 a Gross rents	(i) Real	(ii) Personal				
	6a	695,434.	412,594.				
	b Less: rental expenses ...	6b	245,540.				
	c Rental income or (loss)	6c	449,894.	-16,168.			
	d Net rental income or (loss)			433,726.	403,246.	30,480.	
	7 a Gross amount from sales of assets other than inventory	(i) Securities	(ii) Other				
	7a	79,020,584.					
	b Less: cost or other basis and sales expenses	7b	67,195,865.				
	c Gain or (loss)	7c	11,824,719.				
	d Net gain or (loss)			11,824,719.			11824719.
	8 a Gross income from fundraising events (not including \$ 1,217,746. of contributions reported on line 1c). See Part IV, line 18						
	8a	28,480.					
	b Less: direct expenses	8b	265,671.				
	c Net income or (loss) from fundraising events			-237,191.			-237,191.
9 a Gross income from gaming activities. See Part IV, line 19							
9a							
b Less: direct expenses	9b						
c Net income or (loss) from gaming activities							
10 a Gross sales of inventory, less returns and allowances							
10a	287,769.						
b Less: cost of goods sold	10b	485,691.					
c Net income or (loss) from sales of inventory			-197,922.	53,502.	-251,424.		
Miscellaneous Revenue	11 a MISCELLANEOUS INCOME	Business Code 713990		26,000.	26,000.		
	b						
	c						
	d All other revenue						
	e Total. Add lines 11a-11d			26,000.			
	12 Total revenue. See instructions			24,101,977.	1,029,460.	-220,944.	12803456.

**SOCIETY FOR THE PRESERVATION
OF NEW ENGLAND ANTIQUITIES**

Form 990 (2021)

04-2104937 Page **10**

Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX ☐

	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.				
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21	104,141.	104,141.		
2 Grants and other assistance to domestic individuals. See Part IV, line 22				
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	784,868.	190,028.	346,743.	248,097.
6 Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	5,309,079.	4,430,983.	586,933.	291,163.
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	205,825.	122,425.	61,693.	21,707.
9 Other employee benefits	736,506.	532,264.	135,841.	68,401.
10 Payroll taxes	429,539.	328,807.	63,568.	37,164.
11 Fees for services (nonemployees):				
a Management				
b Legal	73,853.	69,032.	4,821.	
c Accounting	55,135.		55,135.	
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees	601,686.	481,349.	120,337.	
g Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Sch O.)	54,175.		54,175.	
12 Advertising and promotion	187,577.	106,400.	81,177.	
13 Office expenses	449,330.	311,470.	119,208.	18,652.
14 Information technology	419,496.	370,160.	42,571.	6,765.
15 Royalties				
16 Occupancy	610,347.	571,533.	38,814.	
17 Travel	144,576.	98,975.	21,783.	23,818.
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	13,233.	10,168.	2,925.	140.
20 Interest	50,027.	50,027.		
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	570,969.	517,030.	48,870.	5,069.
23 Insurance	214,443.	198,473.	15,970.	
24 Other expenses. Itemize expenses not covered above. (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A), amount, list line 24e expenses on Schedule O.)				
a COLLECTIONS & EXHIBITION	2,462,514.	2,462,514.		
b FACILITY IMPROVEMENTS &	1,714,347.	1,707,721.	6,626.	
c CONSULTING & CONTRACT	675,929.	569,468.	102,216.	4,245.
d GROUPS IMPROVEMENT & M	650,654.	650,654.		
e All other expenses	-185,059.	-215,386.	12,346.	17,981.
25 Total functional expenses. Add lines 1 through 24e	16,333,190.	13,668,236.	1,921,752.	743,202.
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation.				

Check here ☐ if following SOP 98-2 (ASC 958-720)

**SOCIETY FOR THE PRESERVATION
OF NEW ENGLAND ANTIQUITIES**

Form 990 (2021)

04-2104937 Page **11**

Part X Balance Sheet

Check if Schedule O contains a response or note to any line in this Part X ☐

		(A) Beginning of year		(B) End of year
Assets	1 Cash - non-interest-bearing		1	
	2 Savings and temporary cash investments	3,397,390.	2	2,207,985.
	3 Pledges and grants receivable, net	176,879.	3	1,466,551.
	4 Accounts receivable, net	2,552.	4	2,946.
	5 Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		5	
	6 Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B)		6	
	7 Notes and loans receivable, net		7	
	8 Inventories for sale or use	191,150.	8	187,829.
	9 Prepaid expenses and deferred charges	405,052.	9	215,306.
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	15,014,159.		
	b Less: accumulated depreciation	7,211,612.	10c	7,802,547.
	11 Investments - publicly traded securities	130,078,915.	11	124,663,200.
	12 Investments - other securities. See Part IV, line 11	11,677,344.	12	11,411,614.
	13 Investments - program-related. See Part IV, line 11		13	
	14 Intangible assets		14	
	15 Other assets. See Part IV, line 11	971,769.	15	1,060,369.
16 Total assets. Add lines 1 through 15 (must equal line 33)	154,963,761.	16	149,018,347.	
Liabilities	17 Accounts payable and accrued expenses	2,298,231.	17	2,892,011.
	18 Grants payable		18	
	19 Deferred revenue		19	
	20 Tax-exempt bond liabilities	1,567,699.	20	1,347,514.
	21 Escrow or custodial account liability. Complete Part IV of Schedule D		21	
	22 Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		22	
	23 Secured mortgages and notes payable to unrelated third parties	1,275,837.	23	
	24 Unsecured notes and loans payable to unrelated third parties		24	
	25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D	506,366.	25	507,686.
	26 Total liabilities. Add lines 17 through 25	5,648,133.	26	4,747,211.
Net Assets or Fund Balances	Organizations that follow FASB ASC 958, check here ☒ X and complete lines 27, 28, 32, and 33.			
	27 Net assets without donor restrictions	28,257,349.	27	27,485,536.
	28 Net assets with donor restrictions	121,058,279.	28	116,785,600.
	Organizations that do not follow FASB ASC 958, check here ☐ and complete lines 29 through 33.			
	29 Capital stock or trust principal, or current funds		29	
	30 Paid-in or capital surplus, or land, building, or equipment fund		30	
	31 Retained earnings, endowment, accumulated income, or other funds		31	
	32 Total net assets or fund balances	149,315,628.	32	144,271,136.
	33 Total liabilities and net assets/fund balances	154,963,761.	33	149,018,347.

Form **990** (2021)

**SOCIETY FOR THE PRESERVATION
OF NEW ENGLAND ANTIQUITIES**

Form 990 (2021)

04-2104937 Page **12**

Part XI Reconciliation of Net Assets

Check if Schedule O contains a response or note to any line in this Part XI ☒

1	Total revenue (must equal Part VIII, column (A), line 12)	1	24,101,977.
2	Total expenses (must equal Part IX, column (A), line 25)	2	16,333,190.
3	Revenue less expenses. Subtract line 2 from line 1	3	7,768,787.
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	149,315,628.
5	Net unrealized gains (losses) on investments	5	-12,547,549.
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain on Schedule O)	9	-265,730.
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))	10	144,271,136.

Part XII Financial Statements and Reporting

Check if Schedule O contains a response or note to any line in this Part XII ☐

		Yes	No
1	Accounting method used to prepare the Form 990: ☐ Cash ☒ Accrual ☐ Other If the organization changed its method of accounting from a prior year or checked "Other," explain on Schedule O.		
2a	Were the organization's financial statements compiled or reviewed by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both: ☐ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis		X
b	Were the organization's financial statements audited by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both: ☐ Separate basis ☒ Consolidated basis ☐ Both consolidated and separate basis	X	
c	If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? If the organization changed either its oversight process or selection process during the tax year, explain on Schedule O.	X	
3a	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?		X
b	If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why on Schedule O and describe any steps taken to undergo such audits		

Form **990** (2021)

SCHEDULE A
(Form 990)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support
Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.
▶ Attach to Form 990 or Form 990-EZ.
▶ Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2021

Open to Public
Inspection

Name of the organization **SOCIETY FOR THE PRESERVATION
OF NEW ENGLAND ANTIQUITIES**

Employer identification number
04-2104937

Part I Reason for Public Charity Status. (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

- 1 ☐ A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**
- 2 ☐ A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E (Form 990).)
- 3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**
- 4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state: _____
- 5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II.)
- 6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**
- 7 ☒ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 8 ☐ A community trust described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 9 ☐ An agricultural research organization described in **section 170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university: _____
- 10 ☐ An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions, subject to certain exceptions; and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete Part III.)
- 11 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**
- 12 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2).** See **section 509(a)(3).** Check the box on lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.
- a ☐ **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
- b ☐ **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
- c ☐ **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
- d ☐ **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
- e ☐ Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.
- f Enter the number of supported organizations _____
- g Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-10 above (see instructions))	(iv) Is the organization listed in your governing document?		(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
			Yes	No		
Total						

**SOCIETY FOR THE PRESERVATION
OF NEW ENGLAND ANTIQUITIES**

Schedule A (Form 990) 2021

04-2104937 Page 2

Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2017	(b) 2018	(c) 2019	(d) 2020	(e) 2021	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	9859756.	3879634.	3914285.	6254004.	10252733.	34160412.
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 Total. Add lines 1 through 3	9859756.	3879634.	3914285.	6254004.	10252733.	34160412.
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						5723138.
6 Public support. Subtract line 5 from line 4.						28437274.

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2017	(b) 2018	(c) 2019	(d) 2020	(e) 2021	(f) Total
7 Amounts from line 4	9859756.	3879634.	3914285.	6254004.	10252733.	34160412.
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources	3020321.	4086485.	2063555.	1739904.	2323956.	13234221.
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)	11,731.	28,100.	21,674.	12,392.	25,983.	99,880.
11 Total support. Add lines 7 through 10						47494513.
12 Gross receipts from related activities, etc. (see instructions)					12	4,306,682.
13 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here						▶ ☐

Section C. Computation of Public Support Percentage

14 Public support percentage for 2021 (line 6, column (f), divided by line 11, column (f))	14	59.87 %
15 Public support percentage from 2020 Schedule A, Part II, line 14	15	45.14 %
16a 33 1/3% support test - 2021. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization	▶	☒
b 33 1/3% support test - 2020. If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization	▶	☐
17a 10% -facts-and-circumstances test - 2021. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and stop here. Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization	▶	☐
b 10% -facts-and-circumstances test - 2020. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and stop here. Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization	▶	☐
18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions	▶	☐

Schedule A (Form 990) 2021

**SOCIETY FOR THE PRESERVATION
OF NEW ENGLAND ANTIQUITIES**

Schedule A (Form 990) 2021

04-2104937 Page **3**

Part III Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ►	(a) 2017	(b) 2018	(c) 2019	(d) 2020	(e) 2021	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 Total. Add lines 1 through 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
c Add lines 7a and 7b						
8 Public support. (Subtract line 7c from line 6.)						

Section B. Total Support

Calendar year (or fiscal year beginning in) ►	(a) 2017	(b) 2018	(c) 2019	(d) 2020	(e) 2021	(f) Total
9 Amounts from line 6						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
13 Total support. (Add lines 9, 10c, 11, and 12.)						

14 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** ☐

Section C. Computation of Public Support Percentage

15 Public support percentage for 2021 (line 8, column (f), divided by line 13, column (f))	15	%
16 Public support percentage from 2020 Schedule A, Part III, line 15	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2021 (line 10c, column (f), divided by line 13, column (f))	17	%
18 Investment income percentage from 2020 Schedule A, Part III, line 17	18	%

19a 33 1/3% support tests - 2021. If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ☐

b 33 1/3% support tests - 2020. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ☐

20 Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ☐

Part IV Supporting Organizations

(Complete only if you checked a box in line 12 on Part I. If you checked box 12a, Part I, complete Sections A and B. If you checked box 12b, Part I, complete Sections A and C. If you checked box 12c, Part I, complete Sections A, D, and E. If you checked box 12d, Part I, complete Sections A and D, and complete Part V.)

Section A. All Supporting Organizations

	Yes	No
1 Are all of the organization's supported organizations listed by name in the organization's governing documents? <i>If "No," describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.</i>		
2 Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? <i>If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).</i>		
3a Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? <i>If "Yes," answer lines 3b and 3c below.</i>		
b Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? <i>If "Yes," describe in Part VI when and how the organization made the determination.</i>		
c Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? <i>If "Yes," explain in Part VI what controls the organization put in place to ensure such use.</i>		
4a Was any supported organization not organized in the United States ("foreign supported organization")? <i>If "Yes," and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.</i>		
b Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? <i>If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.</i>		
c Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? <i>If "Yes," explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.</i>		
5a Did the organization add, substitute, or remove any supported organizations during the tax year? <i>If "Yes," answer lines 5b and 5c below (if applicable). Also, provide detail in Part VI, including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).</i>		
b Type I or Type II only. Was any added or substituted supported organization part of a class already designated in the organization's organizing document?		
c Substitutions only. Was the substitution the result of an event beyond the organization's control?		
6 Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? <i>If "Yes," provide detail in Part VI.</i>		
7 Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (as defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? <i>If "Yes," complete Part I of Schedule L (Form 990).</i>		
8 Did the organization make a loan to a disqualified person (as defined in section 4958) not described on line 7? <i>If "Yes," complete Part I of Schedule L (Form 990).</i>		
9a Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons, as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? <i>If "Yes," provide detail in Part VI.</i>		
b Did one or more disqualified persons (as defined on line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? <i>If "Yes," provide detail in Part VI.</i>		
c Did a disqualified person (as defined on line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? <i>If "Yes," provide detail in Part VI.</i>		
10a Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? <i>If "Yes," answer line 10b below.</i>		
b Did the organization have any excess business holdings in the tax year? <i>(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)</i>		

Part IV Supporting Organizations (continued)

	Yes	No
11 Has the organization accepted a gift or contribution from any of the following persons?		
a A person who directly or indirectly controls, either alone or together with persons described on lines 11b and 11c below, the governing body of a supported organization?		
11a		
b A family member of a person described on line 11a above?		
11b		
c A 35% controlled entity of a person described on line 11a or 11b above? If "Yes" to line 11a, 11b, or 11c, provide detail in Part VI .		
11c		

Section B. Type I Supporting Organizations

	Yes	No
1 Did the governing body, members of the governing body, officers acting in their official capacity, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's officers, directors, or trustees at all times during the tax year? If "No," describe in Part VI how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove officers, directors, or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.		
1		
2 Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? If "Yes," explain in Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.		
2		

Section C. Type II Supporting Organizations

	Yes	No
1 Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? If "No," describe in Part VI how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).		
1		

Section D. All Type III Supporting Organizations

	Yes	No
1 Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?		
1		
2 Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).		
2		
3 By reason of the relationship described on line 2, above, did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? If "Yes," describe in Part VI the role the organization's supported organizations played in this regard.		
3		

Section E. Type III Functionally Integrated Supporting Organizations

	Yes	No
1 Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).		
a ☐ The organization satisfied the Activities Test. Complete line 2 below.		
b ☐ The organization is the parent of each of its supported organizations. Complete line 3 below.		
c ☐ The organization supported a governmental entity. Describe in Part VI how you supported a governmental entity (see instructions).		
2 Activities Test. Answer lines 2a and 2b below.		
a Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? If "Yes," then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.		
2a		
b Did the activities described on line 2a, above, constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? If "Yes," explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.		
2b		
3 Parent of Supported Organizations. Answer lines 3a and 3b below.		
a Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? If "Yes" or "No" provide details in Part VI .		
3a		
b Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? If "Yes," describe in Part VI the role played by the organization in this regard.		
3b		

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations

- 1** ☐ Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 (*explain in Part VI*). **See instructions.**
All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

Section A - Adjusted Net Income		(A) Prior Year	(B) Current Year (optional)
1 Net short-term capital gain	1		
2 Recoveries of prior-year distributions	2		
3 Other gross income (see instructions)	3		
4 Add lines 1 through 3.	4		
5 Depreciation and depletion	5		
6 Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	6		
7 Other expenses (see instructions)	7		
8 Adjusted Net Income (subtract lines 5, 6, and 7 from line 4)	8		

Section B - Minimum Asset Amount		(A) Prior Year	(B) Current Year (optional)
1 Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):			
a Average monthly value of securities	1a		
b Average monthly cash balances	1b		
c Fair market value of other non-exempt-use assets	1c		
d Total (add lines 1a, 1b, and 1c)	1d		
e Discount claimed for blockage or other factors (<i>explain in detail in Part VI</i>):			
2 Acquisition indebtedness applicable to non-exempt-use assets	2		
3 Subtract line 2 from line 1d.	3		
4 Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount, see instructions).	4		
5 Net value of non-exempt-use assets (subtract line 4 from line 3)	5		
6 Multiply line 5 by 0.035.	6		
7 Recoveries of prior-year distributions	7		
8 Minimum Asset Amount (add line 7 to line 6)	8		

Section C - Distributable Amount			Current Year
1 Adjusted net income for prior year (from Section A, line 8, column A)	1		
2 Enter 0.85 of line 1.	2		
3 Minimum asset amount for prior year (from Section B, line 8, column A)	3		
4 Enter greater of line 2 or line 3.	4		
5 Income tax imposed in prior year	5		
6 Distributable Amount. Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions).	6		
7 ☐ Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions).			

Schedule A (Form 990) 2021

**SOCIETY FOR THE PRESERVATION
OF NEW ENGLAND ANTIQUITIES**

Schedule A (Form 990) 2021

04-2104937 Page 7

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations (continued)

Section D - Distributions		Current Year
1 Amounts paid to supported organizations to accomplish exempt purposes	1	
2 Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	2	
3 Administrative expenses paid to accomplish exempt purposes of supported organizations	3	
4 Amounts paid to acquire exempt-use assets	4	
5 Qualified set-aside amounts (prior IRS approval required - <i>provide details in Part VI</i>)	5	
6 Other distributions (<i>describe in Part VI</i>). See instructions.	6	
7 Total annual distributions. Add lines 1 through 6.	7	
8 Distributions to attentive supported organizations to which the organization is responsive (<i>provide details in Part VI</i>). See instructions.	8	
9 Distributable amount for 2021 from Section C, line 6	9	
10 Line 8 amount divided by line 9 amount	10	

Section E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2021	(iii) Distributable Amount for 2021
1 Distributable amount for 2021 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2021 (reasonable cause required - <i>explain in Part VI</i>). See instructions.			
3 Excess distributions carryover, if any, to 2021			
a From 2016			
b From 2017			
c From 2018			
d From 2019			
e From 2020			
f Total of lines 3a through 3e			
g Applied to underdistributions of prior years			
h Applied to 2021 distributable amount			
i Carryover from 2016 not applied (see instructions)			
j Remainder. Subtract lines 3g, 3h, and 3i from line 3f.			
4 Distributions for 2021 from Section D, line 7: \$			
a Applied to underdistributions of prior years			
b Applied to 2021 distributable amount			
c Remainder. Subtract lines 4a and 4b from line 4.			
5 Remaining underdistributions for years prior to 2021, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, <i>explain in Part VI</i> . See instructions.			
6 Remaining underdistributions for 2021. Subtract lines 3h and 4b from line 1. For result greater than zero, <i>explain in Part VI</i> . See instructions.			
7 Excess distributions carryover to 2022. Add lines 3j and 4c.			
8 Breakdown of line 7:			
a Excess from 2017			
b Excess from 2018			
c Excess from 2019			
d Excess from 2020			
e Excess from 2021			

Schedule A (Form 990) 2021

Supplemental Information. Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a, and 3b; Part V, line 1; Part V, Section B, line 1e; Part V, Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information.
(See instructions.)

SCHEDULE D
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Financial Statements

▶ **Complete if the organization answered "Yes" on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.**

▶ **Attach to Form 990.**

▶ **Go to www.irs.gov/Form990 for instructions and the latest information.**

OMB No. 1545-0047

2021

Open to Public Inspection

Name of the organization **SOCIETY FOR THE PRESERVATION OF NEW ENGLAND ANTIQUITIES**

Employer identification number
04-2104937

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts. Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year		
2 Aggregate value of contributions to (during year)		
3 Aggregate value of grants from (during year)		
4 Aggregate value at end of year		
5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control?		☐ Yes ☐ No
6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit?		☐ Yes ☐ No

Part II Conservation Easements. Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply).
☐ Preservation of land for public use (for example, recreation or education) ☒ Preservation of a historically important land area
☐ Protection of natural habitat ☒ Preservation of a certified historic structure
☒ Preservation of open space

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.

	Held at the End of the Tax Year
a Total number of conservation easements	2a 118
b Total acreage restricted by conservation easements	2b 941.83
c Number of conservation easements on a certified historic structure included in (a)	2c 116
d Number of conservation easements included in (c) acquired after 7/25/06, and not on a historic structure listed in the National Register	2d 44

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year ▶ 2

4 Number of states where property subject to conservation easement is located ▶ 5

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds?

☒ Yes ☐ No

6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶ 7864

7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶ \$ 319,321.

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)?

☒ Yes ☐ No

9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.

Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

1a If the organization elected, as permitted under FASB ASC 958, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide in Part XIII the text of the footnote to its financial statements that describes these items.

b If the organization elected, as permitted under FASB ASC 958, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:

(i) Revenue included on Form 990, Part VIII, line 1

(ii) Assets included in Form 990, Part X

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under FASB ASC 958 relating to these items:

a Revenue included on Form 990, Part VIII, line 1

b Assets included in Form 990, Part X

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule D (Form 990) 2021

Part III	Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets <i>(continued)</i>
-----------------	---

- 3** Using the organization's acquisition, accession, and other records, check any of the following that make significant use of its collection items (check all that apply):

- a ☒ Public exhibition
- b ☒ Scholarly research
- c ☒ Preservation for future generations
- d ☒ Loan or exchange program
- e ☐ Other _____

- 4** Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.

- 5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? ☐ Yes ☒ No

Part IV **Escrow and Custodial Arrangements.** Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

- 1a** Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? ☐ Yes ☒ No

- b** If "Yes," explain the arrangement in Part XIII and complete the following table:

	Amount
c Beginning balance	1c
d Additions during the year	1d
e Distributions during the year	1e
f Ending balance	1f

- 2a** Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? ☐ Yes ☒ No

- b** If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided on Part XIII ☐

Part V	Endowment Funds. Complete if the organization answered "Yes" on Form 990, Part IV, line 10.
---------------	--

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance	103,220,697.	82,612,745.	101,905,283.	106,827,236.	94,090,608
b Contributions	1,505,963.	800,621.	991,138.	1,093,230.	6,477,713.
c Net investment earnings, gains, and losses	-533,301.	25,809,829.	-13,959,370.	-2,066,779.	10,815,489.
d Grants or scholarships					
e Other expenditures for facilities and programs	5,278,538.	5,540,754.	6,324,306.	3,948,404.	4,556,574.
f Administrative expenses					
g End of year balance	98,914,821.	103,220,697.	82,612,745.	101,905,283.	106,827,236

- 2** Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:

- | | | | | |
|---|-------------------------------------|---|---------|---|
| a | Board designated or quasi-endowment | ▶ | 19.8000 | % |
| b | Permanent endowment | ▶ | .0000 | % |
| c | Term endowment | ▶ | 80.2000 | % |

The percentages on lines 2a, 2b, and 2c should equal 100%.

- 3a** Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

	Yes	No
3a(i)		X
3a(ii)		X
3b		

- (i) Unrelated organizations
- (ii) Related organizations

- b** If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R?

- 4** Describe in Part XIII the intended uses of the organization's endowment funds.

Part VI	Land, Buildings, and Equipment.
----------------	--

Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land		610,687.		610,687.
b Buildings		3,659,514.	1,343,266.	2,316,248.
c Leasehold improvements		4,371,001.	2,107,082.	2,263,919.
d Equipment		2,172,289.	1,665,507.	506,782.
e Other		4,200,668.	2,095,757.	2,104,911.
Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.)				7,802,547.

Schedule D (Form 990) 2021

Part VII Investments - Other Securities.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives		
(2) Closely held equity interests		
(3) Other		
(A) BENEFICIAL INTEREST IN		
(B) PERPETUAL TRUSTS	11,411,614.	END-OF-YEAR MARKET VALUE
(C)		
(D)		
(E)		
(F)		
(G)		
(H)		
Total. (Col. (b) must equal Form 990, Part X, col. (B) line 12.) ▶	11,411,614.	

Part VIII Investments - Program Related.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
Total. (Col. (b) must equal Form 990, Part X, col. (B) line 13.) ▶		

Part IX Other Assets.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

(a) Description	(b) Book value
(1)	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, col. (B) line 15.) ▶	

Part X Other Liabilities.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2) REFUNDABLE DEPOSITS	507,686.
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, col. (B) line 25.) ▶	507,686.

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FASB ASC 740. Check here if the text of the footnote has been provided in Part XIII... ☐

Schedule D (Form 990) 2021

Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return.

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

1	Total revenue, gains, and other support per audited financial statements	1	12,146,147.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
a	Net unrealized gains (losses) on investments	2a	-12,281,878.
b	Donated services and use of facilities	2b	
c	Recoveries of prior year grants	2c	
d	Other (Describe in Part XIII.)	2d	927,735.
e	Add lines 2a through 2d	2e	-11,354,143.
3	Subtract line 2e from line 1	3	23,500,290.
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	601,687.
b	Other (Describe in Part XIII.)	4b	
c	Add lines 4a and 4b	4c	601,687.
5	Total revenue. Add lines 3 and 4c . (This must equal Form 990, Part I, line 12.)	5	24,101,977.

Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

1	Total expenses and losses per audited financial statements	1	17,190,639.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
a	Donated services and use of facilities	2a	
b	Prior year adjustments	2b	
c	Other losses	2c	
d	Other (Describe in Part XIII.)	2d	1,459,136.
e	Add lines 2a through 2d	2e	1,459,136.
3	Subtract line 2e from line 1	3	15,731,503.
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	601,687.
b	Other (Describe in Part XIII.)	4b	
c	Add lines 4a and 4b	4c	601,687.
5	Total expenses. Add lines 3 and 4c . (This must equal Form 990, Part I, line 18.)	5	16,333,190.

Part XIII Supplemental Information.

Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

PART II, LINE 3:

IN 2022, (2) PRESERVATION EASEMENTS WERE MODIFIED TO AFFECT A PARTIAL RELEASE OF RESTRICTION FROM ONE PROPERTY AND TRANSFER IT TO PROTECTION UNDER ANOTHER EXISTING PRESERVATION EASEMENT. THE MODIFICATION WAS CONVEYED WITH THE INTENTION OF RESTORING THE BOUNDARY BETWEEN THE TWO PROPERTIES TO ITS ORIGINAL, HISTORIC LOCATION. THE ORIGINAL EASEMENT DOCUMENTS WERE NOT TERMINATED, RATHER MODIFIED.

PART II, LINE 9:

REVENUE AND EXPENSES FOR THE EASEMENTS ARE NOT REFERENCED IN THE FOOTNOTES OF THE FINANCIAL STATEMENTS RATHER THEY ARE BOOKED IN A SEGREGATED BUDGET CENTER KNOWN AS PRESERVATION EASEMENT PROGRAM, THIS INCLUDES EASEMENT REVENUE, PAYROLL, BENEFITS, ADMINISTRATION, ETC. DONATIONS ARE DEPOSITED

Part XIII Supplemental Information (continued)

INTO THE ORGANIZATION'S ENDOWMENTS AND INVESTMENTS AND DRAWN IN COMPLIANCE WITH ITS ANNUAL DRAWDOWN POLICIES. THE ORGANIZATION DOES NOT ACCOUNT FOR EASEMENT PROPERTIES ON ITS BALANCE SHEET.

PART III, LINE 1A:

AS ALLOWED BY ACCOUNTING PRINCIPLES GENERALLY ACCEPTED IN THE UNITED STATES OF AMERICA AND FOLLOWING THE PRACTICES OF MANY LIBRARIES AND MUSEUMS, THE ORGANIZATION HAS NOT CAPITALIZED ITS COLLECTION OF ITEMS OF HISTORICAL NATURE AND OTHER RELATED OBJECTS PURCHASED OR DONATED. THE COLLECTION IS HELD FOR PUBLIC EDUCATION OR RESEARCH IN FURTHERANCE OF PUBLIC SERVICE RATHER THAN FINANCIAL GAIN. THE ORGANIZATION CONTINUALLY REVIEWS ITS COLLECTION AND MAY DE-ACCESS OR ACQUIRE ADDITIONAL ITEMS. EXPENDITURES FOR ADDITIONAL COLLECTION ITEMS ARE PRESENTED AS A REDUCTION IN THE APPROPRIATE CLASS OF NET ASSETS.

PART III, LINE 4:

HISTORIC NEW ENGLAND IS A MUSEUM OF CULTURAL HISTORY WHICH COLLECTS AND PRESERVES BUILDINGS, LANDSCAPES, AND OBJECTS DATING FROM THE SEVENTEENTH CENTURY TO THE PRESENT AND USES THEM TO KEEP HISTORY ALIVE AND TO HELP PEOPLE DEVELOP A DEEPER UNDERSTANDING AND ENJOYMENT OF NEW ENGLAND LIFE AND APPRECIATION FOR ITS PRESERVATION. HISTORIC NEW ENGLAND'S COLLECTIONS COMPRISE THE LARGEST ASSEMBLAGE OF NEW ENGLAND ART AND ARTIFACTS IN THE COUNTRY, AN EXTRAORDINARY BROAD COLLECTION OF MORE THAN 123,000 OBJECTS AND 1.5 MILLION DOCUMENTS AND PHOTOGRAPHS THAT DOCUMENT NEW ENGLAND'S ARCHITECTURAL AND CULTURAL HISTORY.

PART V, LINE 4:

THE ORGANIZATION'S ENDOWMENT CONSISTS OF ENDOWMENT FUNDS ESTABLISHED FOR A

Part XIII Supplemental Information (continued)

VARIETY OF PURPOSES. ITS ENDOWMENT INCLUDES BOTH DONOR-RESTRICTED
ENDOWMENT FUNDS AND FUNDS DESIGNATED BY THE BOARD TO FUNCTION AS
ENDOWMENTS. AS REQUIRED BY GENERALLY ACCEPTED ACCOUNTING PRINCIPLES, NET
ASSETS ASSOCIATED WITH ENDOWMENT FUNDS ARE CLASSIFIED AND REPORTED BASED
ON THE EXISTENCE OR ABSENCE OF DONOR-IMPOSED OR LEGAL RESTRICTIONS.
ENDOWMENT FUNDS INCLUDE INVESTED GIFTS.

AS REQUIRED BY GENERALLY ACCEPTED ACCOUNTING PRINCIPLES, THE ORGANIZATION
CLASSIFIES AS DONOR RESTRICTED NET ASSETS (A) THE ORIGINAL VALUE OF GIFTS
DONATED TO THE PERMANENT ENDOWMENT, (B) THE ORIGINAL VALUE OF SUBSEQUENT
GIFTS TO THE PERMANENT ENDOWMENT, AND (C) ACCUMULATIONS TO THE PERMANENT
ENDOWMENT MADE IN ACCORDANCE WITH THE DIRECTION OF THE APPLICABLE DONOR
GIFT INSTRUMENT AT THE TIME THE ACCUMULATION IS ADDED TO THE FUND. THE
REMAINING PORTION OF THE DONOR-RESTRICTED ENDOWMENT FUND THAT IS NOT
CLASSIFIED AS NON-EXPENDABLE NET ASSETS IS CLASSIFIED AS EXPENDABLE
RESTRICTED NET ASSETS UNTIL THOSE AMOUNTS ARE APPROPRIATED FOR EXPENDITURE
BY THE ORGANIZATION IN A MANNER CONSISTENT WITH THE STANDARD OF PRUDENCE
PRESCRIBED BY STATE LAW.

IN ACCORDANCE WITH THE UNIFORM PRUDENT MANAGEMENT OF INSTITUTIONAL FUNDS
ACT, THE ORGANIZATION CAN CONSIDER THE FOLLOWING FACTORS IN MAKING A
DETERMINATION TO APPROPRIATE OR ACCUMULATE DONOR-RESTRICTED ENDOWMENT
FUNDS: THE DURATION AND PRESERVATION OF THE FUND; THE PURPOSES OF THE
ORGANIZATION AND THE DONOR-RESTRICTED ENDOWMENT FUND; GENERAL ECONOMIC
CONDITIONS; THE POSSIBLE EFFECT OF INFLATION AND DEFLATION; THE EXPECTED
TOTAL RETURN FROM INCOME AND THE APPRECIATION OF INVESTMENTS; OTHER
RESOURCES OF THE ORGANIZATION; AND THE INVESTMENT POLICIES OF THE
ORGANIZATION.

THE ORGANIZATION HAS ADOPTED INVESTMENT AND SPENDING POLICIES FOR ITS
BOARD-DESIGNATED AND OTHER ENDOWMENT ASSETS THAT ATTEMPT TO PROVIDE A

Part XIII Supplemental Information (continued)

PREDICTABLE STREAM OF FUNDING FOR ITS PROGRAMS WHILE SEEKING TO MAINTAIN THE PURCHASING POWER OF THE ENDOWMENT ASSETS. UNDER THIS POLICY, AS APPROVED BY THE BOARD, THE ORGANIZATION'S INVESTMENT COMMITTEE SHALL SEEK TO INVEST THE ENDOWMENT FUNDS IN SUCH A MANNER THAT THE INVESTMENTS WILL PROVIDE A SPENDABLE RETURN CONSISTENT WITH A LONG-TERM GOAL OF PRESERVING THE FUNDS IN REAL TERMS. ACTUAL RETURNS IN ANY GIVEN YEAR MAY VARY FROM THIS AMOUNT.

TO SATISFY ITS LONG-TERM RATE-OF-RETURN OBJECTIVES, THE ORGANIZATION RELIES ON A TOTAL RETURN STRATEGY IN WHICH INVESTMENT RETURNS ARE ACHIEVED THROUGH BOTH CAPITAL APPRECIATION (REALIZED AND UNREALIZED) AND CURRENT YIELD (INTEREST AND DIVIDENDS). THE ORGANIZATION HAS INVESTED IN DEBT AND EQUITY SECURITIES THAT TARGET A DIVERSIFIED ASSET ALLOCATION THAT PLACES A GREATER EMPHASIS ON EQUITY-BASED INVESTMENTS TO ACHIEVE ITS LONG-TERM RETURN OBJECTIVES WITHIN PRUDENT RISK CONSTRAINTS.

THE ORGANIZATION HAS A POLICY OF APPROPRIATING FOR DISTRIBUTION EACH YEAR 5% (THE BOARD MAY APPROVE MORE OR LESS FROM TIME TO TIME) OF THE TWENTY-QUARTER AVERAGE FAIR MARKET VALUE OF THE ENDOWMENT CALCULATED AS OF DECEMBER 31 PRECEDING THE YEAR IN WHICH THE DISTRIBUTION IS PLANNED. IN ESTABLISHING THIS POLICY, THE ORGANIZATION CONSIDERED THE LONG-TERM EXPECTED RETURN ON ITS ENDOWMENT. THIS IS CONSISTENT WITH THE ORGANIZATION'S OBJECTIVE TO MAINTAIN THE PURCHASING POWER OF ITS ENDOWMENT.

FROM TIME TO TIME, THE FAIR VALUE OF ASSETS ASSOCIATED WITH INDIVIDUAL DONOR-RESTRICTED ENDOWMENT FUNDS MAY FALL BELOW THE LEVEL THAT THE DONOR IMPOSED RESTRICTIONS REQUIRE THE ORGANIZATION TO RETAIN AS A FUND OF PERPETUAL DURATION. FUNDS WITH ORIGINAL GIFT VALUES OF \$9,723,775, FAIR VALUES OF \$9,214,522, AND DEFICIENCIES OF \$509,253 WERE REPORTED IN NET ASSETS WITH DONOR RESTRICTIONS AS OF MARCH 31, 2022.

Part XIII Supplemental Information (continued)

PART XI, LINE 2D - OTHER ADJUSTMENTS:

COST OF GOODS SOLD	483,686.
RENTAL EXPENSE	674,302.
UNREALIZED LOSS ON BENEFICIAL INTEREST IN PERPETUAL TRUST	-265,730.
SPNEA CT	35,477.
TOTAL TO SCHEDULE D, PART XI, LINE 2D	927,735.

PART XII, LINE 2D - OTHER ADJUSTMENTS:

COST OF GOODS SOLD	483,686.
RENTAL EXPENSE	674,302.
FUNDRAISING EXPENSES	265,671.
SPNEA CT	35,477.
TOTAL TO SCHEDULE D, PART XII, LINE 2D	1,459,136.

**SCHEDULE F
(Form 990)**Department of the Treasury
Internal Revenue Service**Statement of Activities Outside the United States**

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 14b, 15, or 16.

▶ Attach to Form 990.

▶ Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2021Open to Public
InspectionName of the organization
**SOCIETY FOR THE PRESERVATION
OF NEW ENGLAND ANTIQUITIES**

Employer identification number

04-2104937**Part I General Information on Activities Outside the United States.** Complete if the organization answered "Yes" on Form 990, Part IV, line 14b.

1 For grantmakers. Does the organization maintain records to substantiate the amount of its grants and other assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? ☐ Yes ☐ No

2 For grantmakers. Describe in Part V the organization's procedures for monitoring the use of its grants and other assistance outside the United States.

3 Activities per Region. (The following Part I, line 3 table can be duplicated if additional space is needed.)

(a) Region	(b) Number of offices in the region	(c) Number of employees, agents, and independent contractors in the region	(d) Activities conducted in the region (by type) (such as, fundraising, program services, investments, grants to recipients located in the region)	(e) If activity listed in (d) is a program service, describe specific type of service(s) in the region	(f) Total expenditures for and investments in the region
CENTRAL AMERICA AND THE CARIBBEAN - ANTIGUA & BARBUDA, ARUBA, BAHAMAS,	0	0	INVESTMENTS		16,771,357.
3 a Subtotal	0	0			16,771,357.
b Total from continuation sheets to Part I	0	0			0.
c Totals (add lines 3a and 3b)	0	0			16,771,357.

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule F (Form 990) 2021

**SOCIETY FOR THE PRESERVATION
OF NEW ENGLAND ANTIQUITIES**

Schedule F (Form 990) 2021

04-2104937

Page **2**

Part II **Grants and Other Assistance to Organizations or Entities Outside the United States.** Complete if the organization answered "Yes" on Form 990, Part IV, line 15, for any recipient who received more than \$5,000. Part II can be duplicated if additional space is needed.

1 (a) Name of organization	(b) IRS code section and EIN (if applicable)	(c) Region	(d) Purpose of grant	(e) Amount of cash grant	(f) Manner of cash disbursement	(g) Amount of noncash assistance	(h) Description of noncash assistance	(i) Method of valuation (book, FMV, appraisal, other)

- 2** Enter total number of recipient organizations listed above that are recognized as charities by the foreign country, recognized as a tax exempt 501(c)(3) organization by the IRS, or for which the grantee or counsel has provided a section 501(c)(3) equivalency letter ▶ _____
- 3** Enter total number of other organizations or entities ▶ _____

Schedule F (Form 990) 2021

Part III can be duplicated if additional space is needed.

[illegible]

- 1

Was the organization a U.S. transferor of property to a foreign corporation during the tax year? If "Yes," the organization may be required to file Form 926, Return by a U.S. Transferor of Property to a Foreign Corporation (see Instructions for Form 926)

Yes

☒

No
- 2

Did the organization have an interest in a foreign trust during the tax year? If "Yes," the organization may be required to separately file Form 3520, Annual Return To Report Transactions With Foreign Trusts and Receipt of Certain Foreign Gifts, and/or Form 3520-A, Annual Information Return of Foreign Trust With a U.S. Owner (see Instructions for Forms 3520 and 3520-A; don't file with Form 990)

Yes

☒

No
- 3

Did the organization have an ownership interest in a foreign corporation during the tax year? If "Yes," the organization may be required to file Form 5471, Information Return of U.S. Persons With Respect to Certain Foreign Corporations (see Instructions for Form 5471)

Yes

☒

No
- 4

Was the organization a direct or indirect shareholder of a passive foreign investment company or a qualified electing fund during the tax year? If "Yes," the organization may be required to file Form 8621, Information Return by a Shareholder of a Passive Foreign Investment Company or Qualified Electing Fund (see Instructions for Form 8621)

Yes

☒

No
- 5

Did the organization have an ownership interest in a foreign partnership during the tax year? If "Yes," the organization may be required to file Form 8865, Return of U.S. Persons With Respect to Certain Foreign Partnerships (see Instructions for Form 8865)

Yes

☒

No
- 6

Did the organization have any operations in or related to any boycotting countries during the tax year? If "Yes," the organization may be required to separately file Form 5713, International Boycott Report (see Instructions for Form 5713; don't file with Form 990)

Yes

☒

No

Part V	Supplemental Information
---------------	---------------------------------

Provide the information required by Part I, line 2 (monitoring of funds); Part I, line 3, column (f) (accounting method; amounts of investments vs. expenditures per region); Part II, line 1 (accounting method); Part III (accounting method); and Part III, column (c) (estimated number of recipients), as applicable. Also complete this part to provide any additional information. See instructions.

Department of the Treasury
Internal Revenue Service

Supplemental Information Regarding Fundraising or Gaming Activities

Complete if the organization answered "Yes" on Form 990, Part IV, line 17, 18, or 19, or if the organization entered more than \$15,000 on Form 990-EZ, line 6a.

▶ Attach to Form 990 or Form 990-EZ.

▶ Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2021

Open to Public Inspection

Name of the organization SOCIETY FOR THE PRESERVATION
OF NEW ENGLAND ANTIQUITIES

Employer identification number
04-2104937

Part I

Fundraising Activities. Complete if the organization answered "Yes" on Form 990, Part IV, line 17. Form 990-EZ filers are not required to complete this part.

1 Indicate whether the organization raised funds through any of the following activities. Check all that apply.

- a ☐ Mail solicitations
- b ☐ Internet and email solicitations
- c ☐ Phone solicitations
- d ☐ In-person solicitations
- e ☐ Solicitation of non-government grants
- f ☐ Solicitation of government grants
- g ☐ Special fundraising events

2 a Did the organization have a written or oral agreement with any individual (including officers, directors, trustees, or key employees listed in Form 990, Part VII) or entity in connection with professional fundraising services?

☐ Yes☐ **No**

b If "Yes," list the 10 highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least \$5,000 by the organization.

[illegible]

3 List all states in which the organization is registered or licensed to solicit contributions or has been notified it is exempt from registration or licensing.

**SOCIETY FOR THE PRESERVATION
OF NEW ENGLAND ANTIQUITIES**

Part II Fundraising Events. Complete if the organization answered "Yes" on Form 990, Part IV, line 18, or reported more than \$15,000 of fundraising event contributions and gross income on Form 990-EZ, lines 1 and 6b. List events with gross receipts greater than \$5,000.

		(a) Event #1	(b) Event #2	(c) Other events NONE	(d) Total events (add col. (a) through col. (c))
		MEDAL GALA			
		(event type)	(event type)	(total number)	
Revenue	1 Gross receipts	1,246,226.			1,246,226.
	2 Less: Contributions	1,217,746.			1,217,746.
	3 Gross income (line 1 minus line 2)	28,480.			28,480.
Direct Expenses	4 Cash prizes				
	5 Noncash prizes				
	6 Rent/facility costs	125,638.			125,638.
	7 Food and beverages				
	8 Entertainment				
	9 Other direct expenses	140,033.			140,033.
	10 Direct expense summary. Add lines 4 through 9 in column (d)				265,671.
11 Net income summary. Subtract line 10 from line 3, column (d)				-237,191.	

Part III Gaming. Complete if the organization answered "Yes" on Form 990, Part IV, line 19, or reported more than \$15,000 on Form 990-EZ, line 6a.

		(a) Bingo	(b) Pull tabs/instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming (add col. (a) through col. (c))
Revenue	1 Gross revenue				
	2 Cash prizes				
Direct Expenses	3 Noncash prizes				
	4 Rent/facility costs				
	5 Other direct expenses				
6 Volunteer labor	☐ Yes _____ % ☐ No	☐ Yes _____ % ☐ No	☐ Yes _____ % ☐ No		
7 Direct expense summary. Add lines 2 through 5 in column (d)					
8 Net gaming income summary. Subtract line 7 from line 1, column (d)					

9 Enter the state(s) in which the organization conducts gaming activities: _____

a Is the organization licensed to conduct gaming activities in each of these states? ☐ Yes ☐ No

b If "No," explain: _____

10a Were any of the organization's gaming licenses revoked, suspended, or terminated during the tax year? ☐ Yes ☐ No

b If "Yes," explain: _____

**SOCIETY FOR THE PRESERVATION
OF NEW ENGLAND ANTIQUITIES**

- 11** Does the organization conduct gaming activities with nonmembers? ☐ Yes ☐ No
- 12** Is the organization a grantor, beneficiary or trustee of a trust, or a member of a partnership or other entity formed to administer charitable gaming? ☐ Yes ☐ No
- 13** Indicate the percentage of gaming activity conducted in:
- | | | |
|--------------------------------------|------------|---|
| a The organization's facility | 13a | % |
| b An outside facility | 13b | % |
- 14** Enter the name and address of the person who prepares the organization's gaming/special events books and records:

Name ► _____

Address ► _____

- 15a** Does the organization have a contract with a third party from whom the organization receives gaming revenue? ☐ Yes ☐ No

b If "Yes," enter the amount of gaming revenue received by the organization ► \$ _____ and the amount of gaming revenue retained by the third party ► \$ _____

c If "Yes," enter name and address of the third party:

Name ► _____

Address ► _____

- 16** Gaming manager information:

Name ► _____

Gaming manager compensation ► \$ _____

Description of services provided ► _____

☐ Director/officer ☐ Employee ☐ Independent contractor

- 17** Mandatory distributions:

a Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license? ☐ Yes ☐ No

b Enter the amount of distributions required under state law to be distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year ► \$ _____

Part IV Supplemental Information. Provide the explanations required by Part I, line 2b, columns (iii) and (v); and Part III, lines 9, 9b, 10b, 15b, 15c, 16, and 17b, as applicable. Also provide any additional information. See instructions.

Part IV	Supplemental Information <i>(continued)</i>
----------------	--

[illegible]

SCHEDULE I
(Form 990)

Department of the Treasury
Internal Revenue Service

**Grants and Other Assistance to Organizations,
Governments, and Individuals in the United States**
Complete if the organization answered "Yes" on Form 990, Part IV, line 21 or 22.

▶ Attach to Form 990.

▶ Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047

2021

Open to Public
Inspection

Name of the organization **SOCIETY FOR THE PRESERVATION
OF NEW ENGLAND ANTIQUITIES**

Employer identification number
04-2104937

Part I General Information on Grants and Assistance

- 1** Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? ☒ Yes ☐ No
- 2** Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

Part II Grants and Other Assistance to Domestic Organizations and Domestic Governments. Complete if the organization answered "Yes" on Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

1 (a) Name and address of organization or government	(b) EIN	(c) IRC section (if applicable)	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of noncash assistance	(h) Purpose of grant or assistance
SPNEA CT 141 CAMBRIDGE STREET BOSTON, MA 02114	45-4847030		104,141.	0.			HISTORIC BUILDING PRESERVATION/EDUCATIONAL TOURS

- 2** Enter total number of section 501(c)(3) and government organizations listed in the line 1 table ▶
- 3** Enter total number of other organizations listed in the line 1 table ▶

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule I (Form 990) 2021

SOCIETY FOR THE PRESERVATION
OF NEW ENGLAND ANTIQUITIES

04-2104937

Part III **Grants and Other Assistance to Domestic Individuals.** Complete if the organization answered "Yes" on Form 990, Part IV, line 22.
Part III can be duplicated if additional space is needed.

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of non-cash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of noncash assistance

Part IV **Supplemental Information.** Provide the information required in Part I, line 2; Part III, column (b); and any other additional information.

**SCHEDULE J
(Form 990)**

Department of the Treasury
Internal Revenue Service

Compensation Information

For certain Officers, Directors, Trustees, Key Employees, and Highest
Compensated Employees

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 23.

▶ Attach to Form 990.

▶ Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2021

Open to Public
Inspection

Name of the organization

**SOCIETY FOR THE PRESERVATION
OF NEW ENGLAND ANTIQUITIES**

Employer identification number

04-2104937

Part I Questions Regarding Compensation

1a Check the appropriate box(es) if the organization provided any of the following to or for a person listed on Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.

- | | |
|--|--|
| ☐ First-class or charter travel | ☐ Housing allowance or residence for personal use |
| ☐ Travel for companions | ☐ Payments for business use of personal residence |
| ☐ Tax indemnification and gross-up payments | ☐ Health or social club dues or initiation fees |
| ☐ Discretionary spending account | ☐ Personal services (such as maid, chauffeur, chef) |

b If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain

2 Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, and officers, including the CEO/Executive Director, regarding the items checked on line 1a?

3 Indicate which, if any, of the following the organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III.

- | | |
|---|---|
| ☐ Compensation committee | ☒ Written employment contract |
| ☐ Independent compensation consultant | ☒ Compensation survey or study |
| ☒ Form 990 of other organizations | ☒ Approval by the board or compensation committee |

4 During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization:

a Receive a severance payment or change-of-control payment?

b Participate in or receive payment from a supplemental nonqualified retirement plan?

c Participate in or receive payment from an equity-based compensation arrangement?

If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.

Only section 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.

5 For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:

a The organization?

b Any related organization?

If "Yes" on line 5a or 5b, describe in Part III.

6 For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:

a The organization?

b Any related organization?

If "Yes" on line 6a or 6b, describe in Part III.

7 For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments not described on lines 5 and 6? If "Yes," describe in Part III

8 Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III

9 If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?

Yes No

1b		
2		
4a		X
4b	X	
4c		X
5a		X
5b		X
6a		X
6b		X
7		X
8		X
9		

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule J (Form 990) 2021

**SOCIETY FOR THE PRESERVATION
OF NEW ENGLAND ANTIQUITIES**

Schedule J (Form 990) 2021

04-2104937

Page **2**

Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees. Use duplicate copies if additional space is needed.

For each individual whose compensation must be reported on Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii). Do not list any individuals that aren't listed on Form 990, Part VII.

Note: The sum of columns (B)(i)-(iii) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, applicable column (D) and (E) amounts for that individual.

(A) Name and Title		(B) Breakdown of W-2 and/or 1099-MISC and/or 1099-NEC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation in column (B) reported as deferred on prior Form 990
		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
(1) VIN CIPOLLA PRESIDENT/CEO	(i)	305,322.	0.	0.	58,223.	10,549.	374,094.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(2) DIANE L. VIERA EXECUTIVE VP & COO	(i)	193,998.	0.	0.	9,838.	12,523.	216,359.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(3) JENNIFER KENT VP FOR ADVANCEMENT	(i)	157,933.	0.	0.	7,254.	6,661.	171,848.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(4) WENDY E. GUS DIRECTOR OF FINANCE	(i)	127,615.	0.	0.	5,600.	17,131.	150,346.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							

Schedule J (Form 990) 2021

Part III Supplemental Information

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

PART I, LINE 4B:

THE ORGANIZATION HAS IRS CODES 457(B) AND 457(F) DEFERRED COMPENSATION PLANS
PROVIDING BENEFITS TO THE PRESIDENT/CEO COMMENCING UPON RETIREMENT. THE
ACCRUED DEFERRED COMPENSATION FOR THE CURRENT YEAR WAS \$38,439 AND \$28,611
RESPECTIVELY.

Supplemental Information on Tax-Exempt Bonds

▶ **Complete if the organization answered "Yes" on Form 990, Part IV, line 24a. Provide descriptions, explanations, and any additional information in Part VI.**
▶ **Attach to Form 990. ▶ Go to www.irs.gov/Form990 for instructions and the latest information.**

OMB No. 1545-0047

2021
Open to Public Inspection

Name of the organization **SOCIETY FOR THE PRESERVATION OF NEW ENGLAND ANTIQUITIES**

Employer identification number
04-2104937

Part I Bond Issues

(a) Issuer name	(b) Issuer EIN	(c) CUSIP #	(d) Date issued	(e) Issue price	(f) Description of purpose	(g) Defeased		(h) On behalf of issuer		(i) Pooled financing	
						Yes	No	Yes	No	Yes	No
A MEFA BOND	04-2104937	57586EL01	07/01/09	1,855,000.	REFINANCE EXISTING BOND		X		X		X
B											
C											
D											

Part II Proceeds

	A		B		C		D	
1 Amount of bonds retired	1,250,000.							
2 Amount of bonds legally defeased								
3 Total proceeds of issue	1,855,000.							
4 Gross proceeds in reserve funds	18,550.							
5 Capitalized interest from proceeds								
6 Proceeds in refunding escrows								
7 Issuance costs from proceeds	27,318.							
8 Credit enhancement from proceeds								
9 Working capital expenditures from proceeds								
10 Capital expenditures from proceeds								
11 Other spent proceeds								
12 Other unspent proceeds								
13 Year of substantial completion	2006							
	Yes	No	Yes	No	Yes	No	Yes	No
14 Were the bonds issued as part of a refunding issue of tax-exempt bonds (or, if issued prior to 2018, a current refunding issue)?		X						
15 Were the bonds issued as part of a refunding issue of taxable bonds (or, if issued prior to 2018, an advance refunding issue)?		X						
16 Has the final allocation of proceeds been made?	X							
17 Does the organization maintain adequate books and records to support the final allocation of proceeds?	X							

LHA **For Paperwork Reduction Act Notice, see the Instructions for Form 990.**

Schedule K (Form 990) 2021

**SOCIETY FOR THE PRESERVATION
OF NEW ENGLAND ANTIQUITIES**

Schedule K (Form 990) 2021

04-2104937

Page 2

Part III Private Business Use

	A		B		C		D	
	Yes	No	Yes	No	Yes	No	Yes	No
1 Was the organization a partner in a partnership, or a member of an LLC, which owned property financed by tax-exempt bonds?		X						
2 Are there any lease arrangements that may result in private business use of bond-financed property?		X						
3a Are there any management or service contracts that may result in private business use of bond-financed property?		X						
b If "Yes" to line 3a, does the organization routinely engage bond counsel or other outside counsel to review any management or service contracts relating to the financed property?								
c Are there any research agreements that may result in private business use of bond-financed property?		X						
d If "Yes" to line 3c, does the organization routinely engage bond counsel or other outside counsel to review any research agreements relating to the financed property? ...								
4 Enter the percentage of financed property used in a private business use by entities other than a section 501(c)(3) organization or a state or local government		%		%		%		%
5 Enter the percentage of financed property used in a private business use as a result of unrelated trade or business activity carried on by your organization, another section 501(c)(3) organization, or a state or local government	40.00	%		%		%		%
6 Total of lines 4 and 5	40.00	%		%		%		%
7 Does the bond issue meet the private security or payment test?		X						
8a Has there been a sale or disposition of any of the bond-financed property to a non-governmental person other than a 501(c)(3) organization since the bonds were issued?		X						
b If "Yes" to line 8a, enter the percentage of bond-financed property sold or disposed of		%		%		%		%
c If "Yes" to line 8a, was any remedial action taken pursuant to Regulations sections 1.141-12 and 1.145-2?								
9 Has the organization established written procedures to ensure that all nonqualified bonds of the issue are remediated in accordance with the requirements under Regulations sections 1.141-12 and 1.145-2?		X						

Part IV Arbitrage

	A		B		C		D	
	Yes	No	Yes	No	Yes	No	Yes	No
1 Has the issuer filed Form 8038-T, Arbitrage Rebate, Yield Reduction and Penalty in Lieu of Arbitrage Rebate?		X						
2 If "No" to line 1, did the following apply?								
a Rebate not due yet?		X						
b Exception to rebate?		X						
c No rebate due?		X						
If "Yes" to line 2c, provide in Part VI the date the rebate computation was performed								
3 Is the bond issue a variable rate issue?	X							

**SCHEDULE M
(Form 990)**

Department of the Treasury
Internal Revenue Service

Noncash Contributions

OMB No. 1545-0047

2021

Open to Public
Inspection

- ▶ **Complete if the organizations answered "Yes" on Form 990, Part IV, lines 29 or 30.**
▶ **Attach to Form 990.**
▶ **Go to www.irs.gov/Form990 for instructions and the latest information.**

Name of the organization **SOCIETY FOR THE PRESERVATION
OF NEW ENGLAND ANTIQUITIES** Employer identification number
04-2104937

Part I Types of Property

	(a) Check if applicable	(b) Number of contributions or items contributed	(c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g	(d) Method of determining noncash contribution amounts
1 Art - Works of art				
2 Art - Historical treasures				
3 Art - Fractional interests				
4 Books and publications				
5 Clothing and household goods				
6 Cars and other vehicles				
7 Boats and planes				
8 Intellectual property				
9 Securities - Publicly traded	X	21	495,535.	FAIR MARKET VALUE
10 Securities - Closely held stock				
11 Securities - Partnership, LLC, or trust interests				
12 Securities - Miscellaneous				
13 Qualified conservation contribution - Historic structures				
14 Qualified conservation contribution - Other ...				
15 Real estate - Residential				
16 Real estate - Commercial				
17 Real estate - Other				
18 Collectibles				
19 Food inventory				
20 Drugs and medical supplies				
21 Taxidermy				
22 Historical artifacts	X	50	0.	STMT SCH M, LINE 33
23 Scientific specimens				
24 Archeological artifacts				
25 Other ▶ (.....				
26 Other ▶ (.....				
27 Other ▶ (.....				
28 Other ▶ (.....				

29 Number of Forms 8283 received by the organization during the tax year for contributions
for which the organization completed Form 8283, Part V, Donee Acknowledgement **29**

	Yes	No
30a During the year, did the organization receive by contribution any property reported in Part I, lines 1 through 28, that it must hold for at least three years from the date of the initial contribution, and which isn't required to be used for exempt purposes for the entire holding period?		X
b If "Yes," describe the arrangement in Part II.		
31 Does the organization have a gift acceptance policy that requires the review of any nonstandard contributions?	X	
32a Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions?		X
b If "Yes," describe in Part II.		
33 If the organization didn't report an amount in column (c) for a type of property for which column (a) is checked, describe in Part II.		

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule M (Form 990) 2021

Part II

Supplemental Information. Provide the information required by Part I, lines 30b, 32b, and 33, and whether the organization is reporting in Part I, column (b), the number of contributions, the number of items received, or a combination of both. Also complete this part for any additional information.

SCHEDULE M, LINE 32B:

SCHEDULE M, LINE, 33:

NO AMOUNT IS REPORTED IN REVENUE RELATED TO THE CONTRIBUTIONS OF ART
AND HISTORICAL ARTIFACTS ON THE ORGANIZATION'S FORM 990, PART VIII,
STATEMENT OF REVENUE, LINE 1G OR SCHEDULE M, PART I BECAUSE THE
ORGANIZATION DOES NOT CAPITALIZE ITS COLLECTION AS ALLOWED UNDER ASC
958-605.

**SCHEDULE O
(Form 990)**

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on
Form 990 or 990-EZ or to provide any additional information.

▶ Attach to Form 990 or Form 990-EZ.

▶ Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047

2021

Open to Public
Inspection

Name of the organization

**SOCIETY FOR THE PRESERVATION
OF NEW ENGLAND ANTIQUITIES**

Employer identification number
04-2104937

FORM 990, PART VI, SECTION B, LINE 11B:

PRIOR TO FILING, THE AUDIT AND 990 ARE PRESENTED TO THE PRESIDENT/ CEO IN
ADDITION TO THE AUDIT COMMITTEE FOR REVIEW. ONCE SATISFIED THE 990 IS
SUBMITTED TO THE FULL BOARD FOR REVIEW AND APPROVAL.

FORM 990, PART VI, SECTION B, LINE 12C:

THE BOARD OF DIRECTORS REVIEWS THE ORGANIZATION'S CONFLICT OF INTEREST
POLICY ANNUALLY IN ORDER TO ENSURE THAT THE ORGANIZATION'S BOARD OF
DIRECTORS, OFFICERS, AND EMPLOYEES ARE REGULARLY AND CONSISTENTLY
MONITORING AND ENFORCING IT.

FORM 990, PART VI, SECTION B, LINE 15:

THE BOARD APPROVES THE PRESIDENT/ CEO CONTRACT AT RENEWAL. DIRECTORS
OFFICERS AND OTHER EMPLOYEES COMPENSATION IS APPROVED BY THE PRESIDENT.
FURTHER HISTORIC NEW ENGLAND HAS ACCESS TO VARIOUS MARKET SURVEYS TO
DETERMINE FMV OF EACH POSITIONS COMPENSATION.

FORM 990, PART VI, SECTION C, LINE 18:

FORM 1023 IS AVAILABLE UPON REQUEST. THE ORGANIZATION'S 990 AND 990-T ARE
AVAILABLE UPON REQUEST AND ARE ALSO AVAILABLE ON THE WEBSITES OF OTHER
ORGANIZATIONS.

FORM 990, PART VI, SECTION C, LINE 19:

UPON REQUEST

FORM 990, PART XI, LINE 9, CHANGES IN NET ASSETS:

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule O (Form 990) 2021

Name of the organization **SOCIETY FOR THE PRESERVATION
OF NEW ENGLAND ANTIQUITIES**

Employer identification number
04-2104937

UNREALIZED LOSS ON BENEFICIAL INTEREST IN PERPETUAL TRUST -265,730.

LAND PURCHASE FOR COLLECTION

TOTAL TO FORM 990, PART XI, LINE 9 -265,730.

Related Organizations and Unrelated Partnerships

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37.
▶ Attach to Form 990.

► Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2021

Open to Public Inspection

Name of the organization

SOCIETY FOR THE PRESERVATION
OF NEW ENGLAND ANTIQUITIES

Employer identification number
04-2104937

Part I Identification of Disregarded Entities. Complete if the organization answered "Yes" on Form 990, Part IV, line 33.

(a) Name, address, and EIN (if applicable) of disregarded entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Total income	(e) End-of-year assets	(f) Direct controlling entity

Part II Identification of Related Tax-Exempt Organizations. Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related tax-exempt organizations during the tax year.

[illegible]

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule R (Form 990) 2021

Schedule R (Form 990) 2021

Page 2

Part III

[illegible]

Part IV

[illegible]

Part V Transactions With Related Organizations. Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35b, or 36.

Note: Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule.

	Yes	No
1 During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?		
a Receipt of (i) interest, (ii) annuities, (iii) royalties, or (iv) rent from a controlled entity		X
b Gift, grant, or capital contribution to related organization(s)	X	
c Gift, grant, or capital contribution from related organization(s)		X
d Loans or loan guarantees to or for related organization(s)		X
e Loans or loan guarantees by related organization(s)		X
f Dividends from related organization(s)		X
g Sale of assets to related organization(s)		X
h Purchase of assets from related organization(s)		X
i Exchange of assets with related organization(s)		X
j Lease of facilities, equipment, or other assets to related organization(s)		X
k Lease of facilities, equipment, or other assets from related organization(s)		X
l Performance of services or membership or fundraising solicitations for related organization(s)		X
m Performance of services or membership or fundraising solicitations by related organization(s)		X
n Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)		X
o Sharing of paid employees with related organization(s)		X
p Reimbursement paid to related organization(s) for expenses		X
q Reimbursement paid by related organization(s) for expenses		X
r Other transfer of cash or property to related organization(s)		X
s Other transfer of cash or property from related organization(s)		X
2 If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds.		

(a) Name of related organization	(b) Transaction type (a-s)	(c) Amount involved	(d) Method of determining amount involved
(1) SPNEA CT	B	104,141.	COST
(2)			
(3)			
(4)			
(5)			
(6)			

Provide additional information for responses to questions on Schedule R. See instructions.

SOCIETY FOR THE PRESERVATION OF NEW ENGLAND ANTIQUITIES
(D/B/A Historic New England)

STATEMENT OF FINANCIAL POSITION

MARCH 31, 2023
(with Summarized Financial Information for 2022)

	<u>2023</u>	<u>2022</u>
Assets		
Current assets		
Cash	\$ 2,101,251	\$ 2,207,985
Accounts receivable, net	11,873	2,946
Grants receivable	2,542,102	1,388,275
Contributions receivable	74,843	75,543
Inventory	181,221	187,829
Prepaid expenses	<u>514,669</u>	<u>215,306</u>
Total current assets	5,425,959	4,077,884
Long-term contributions receivable	50,390	2,733
Investments	124,916,360	124,663,200
Beneficial interest in perpetual trusts	10,056,861	11,411,614
Property and equipment, net	7,403,128	7,802,547
Other assets, net	<u>222,467</u>	<u>1,060,369</u>
	<u><u>\$ 148,075,165</u></u>	<u><u>\$ 149,018,347</u></u>
Liabilities and Net Assets		
Current liabilities		
Current maturities of long-term debt	\$ 227,796	\$ 248,038
Accounts payable, trade	315,956	428,066
Accrued and other liabilities	1,050,609	969,556
Refundable deposits and advances	<u>437,895</u>	<u>507,686</u>
Total current liabilities	2,032,256	2,153,346
Accrued and other liabilities	669,767	1,494,389
Long-term debt, less current maturities, net	<u>896,334</u>	<u>1,099,476</u>
	<u><u>3,598,357</u></u>	<u><u>4,747,211</u></u>
Net assets		
Without donor restrictions		
Undesignated	7,848,716	7,900,226
Board-designated for endowment	21,287,212	19,585,310
With donor restrictions	<u>115,340,880</u>	<u>116,785,600</u>
Total net assets	<u><u>144,476,808</u></u>	<u><u>144,271,136</u></u>
	<u><u>\$ 148,075,165</u></u>	<u><u>\$ 149,018,347</u></u>

See accompanying independent auditor's report and notes to financial statements.



Historic Building Detail: WAT.10

Browne, Abraham House

MHC ID	WAT.10 MACRIS Maps for WAT.10 NR:  Inventory: 
Historic Name	Browne, Abraham House
Common Name	-
Street Address	562 Main St -
City/Town	Watertown
Village/Neighborhood	Bemis;
Local Number	104;
Year Constructed	1694
Architects	-
Architectural Styles	First Period;
Uses	Agricultural; Museum; Single Family Dwelling House;
Significance	Architecture;
Areas	WAT.F: First Period Buildings of Eastern Massachusetts NR: 
Designations	Nat'l Register Individual Property (03/09/1990); Nat'l Register TRA (03/09/1990); Preservation Restriction (08/02/2012);
Building Materials Roof	Wood Shingle;
Building Materials Wall	Wood Clapboard;
Building Materials Foundation	-
Demolished	No



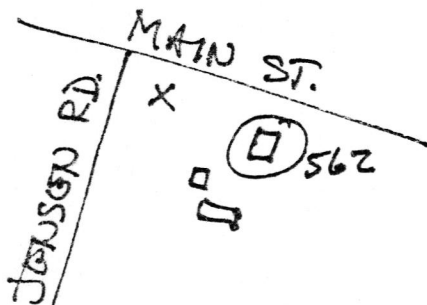
MASSACHUSETTS HISTORICAL COMMISSION
80 BOYLSTON STREET
BOSTON, MA 02116

TOX
LISTED 3.9.90

FORM NO.

104 10

65:2 facade
65:6 18th c. addition from rear
65:21 transverse summer 1st floor
65: 18 first floor chimney
65:10 chamber chimney wall
65: 5 Derby Barn
65:8 transverse summer



Town Watertown.

Address 562 Main Street

Historic Name Abraham Browne House

Use: Present Museum/residence

Original Residence

DESCRIPTION

Date ca. 1694-1701

Source Deeds, visual analysis

Style First Period

Architect Unknown

Exterior Wall Fabric Clapboards

Outbuildings 2 barns - ca. 1800 (Derby Barn). and late 19th c.

Major Alterations (with dates) North addition after 1727; lean-to, 19th c.

Condition Excellent; altered

Moved barn only Date 1925

Acreage less than one acre

Setting Residential. backing up to Browne School on busy main street among closely spaced houses of first half of 20th century.

Recorded by Richard Candee

Organization Boston University

Date June 1986

TM REFERENCE 19 / 318-780 / 4693-230

GS QUADRANGLE Newton

SCALE 1:25,000

INVENTORY FORM CONTINUATION SHEET

MASSACHUSETTS HISTORICAL COMMISSION
Office of the Secretary, Boston

Community: WATERTOWN	Form No: 10410
Property Name: Abraham Browne House	

Indicate each item on inventory form which is being continued below.

SIGNIFICANCE

The Browne House possesses integrity of location, design, materials, workmanship, feeling and association. It is an outstanding example of the single-cell original plan, with unique construction and decorative features associated with First Period architecture in eastern Massachusetts, meeting Criterion C. The three-part casement opening in the rear wall is the only known Massachusetts example found in situ (and became the model for many later restorations besides its own). The late use of tusk tenon floor joist joints is an unusual conservative trait of structural carpentry. The high survival of molded horizontal sheathing on the first floor, wrought decorative hardware, painted decoration on the original plaster wall, and applied decorative trim to fireplace and ceiling of the second floor make it one of the most complete First Period houses in the county. Its roofing system of principal rafters is one of a small group that form the heart of a Middlesex county regional pattern that continues into the later eighteenth century.

The Browne house also meets Criterion D for its potential to reveal further information about First Period framing and finish methods. Much information was already revealed during investigations that took place during the Appleton restorations of 1919-20.

EXTERIOR DESCRIPTION

The original c.1694-1701 core, a two story single cell house with a pilastered end chimney in the original west bay, faces south, and has a 19th century lean-to along the west wall and a third of its north wall. Its own chimney is located in the NW corner. Abutting the remainder of the north wall is a large post-1727 two-story central chimney addition which has its primary facade on the east and runs at right angles to the original First Period house. The southern facade of the original house has a restored First Period entrance door into the far western end of the chimney bay with a single restored casement window above, a large restored three-part casement window on both stories, and a small single casement light near the east end above the bulkhead entrance to the cellar. (Another major addition, built before 1727 to the present south wall, was removed in the restoration of 1919-20.) It is thought that the house may originally have had a rear leanto that was removed in the eighteenth century changes. [1]

MAJOR FIRST PERIOD FEATURES

The house has a transverse 1st floor summer beam and 2nd floor transverse tie, both decorated with bevel chamfers and taper stops. It is unusual for a late 17th century ceiling to use joists with tusk-tenons, a feature largely supplanted by butt-cog floor joists after 1660. The interior walls of the first floor have horizontal sheathing with a molded edge and a large original fireplace (restored by Appleton in 1919-20). [2]

INVENTORY FORM CONTINUATION SHEET

MASSACHUSETTS HISTORICAL COMMISSION
Office of the Secretary, Boston

Community:	Form No:
WATERTOWN	10410
Property Name: Abraham Browne House	

Indicate each item on inventory form which is being continued below.

The second floor room is unique for retaining a three-part window casement frame with its molded mullion all in place in the north wall, where it was blocked after 1727 by the addition. In this room, as well as on the first floor, the original plaster is laid directly over the brick nogging and studs with no laths. The room was also decorated with black painted "baseboards" during the First Period. [3] The wall above the chamber fireplace is set back and allows an original mantel shelf of applied moldings. The door from the stairhall to this second floor chamber has original First Period C-curve and strap decorative hinges. [4] The tie beam is transverse; the floor joists meet the girts and have coverboard at right angles at the junction with joists, forming "a rudimentary boxed cornice" [5]

The roof is composed of principal rafters without purlins. The large fireplace in the hall, the chamber fireplace and pilastered chimney stack are original, although carefully restored in 1919-20.

SIGNIFICANT LATER FEATURES

The 1727 addition with its pedimented east facade doorway and central chimney plan is characteristic of Second Period construction, and of unusually early date for Watertown. The Derby Barn is an important building type of which few examples survive, and is associated with the master builder-architect, Samuel McIntire.

SETTING

Along Main Street (Route 1) combining commercial, public, and residential uses; near the Waltham town line. The house is set back from the street 60 feet in the center of the house lot. Two barns are located to the south, one the c. 1800 Derby Barn attributed to Samuel McIntire and relocated from the Elias Hasket Derby estate in 1925.

HISTORICAL INFORMATION

Capt. Abraham Browne acquired the property by 1694, and Selectmen's records show that the house was standing by 1701. It came into the possession of the Society for the Preservation of New England Antiquities in 1919, and in 1919-20 the society's founder, William Sumner Appleton, investigated and restored the building with the assistance of Joseph Everett Chandler and Norman Isham, two early leading architects of restoration and specialists in First Period architecture. Under Appleton's hand the building yielded unique information about First Period construction methods, materials, and finish. The restoration has been cited as an outstanding example of early twentieth century restoration philosophy. [6]

INVENTORY FORM CONTINUATION SHEET

MASSACHUSETTS HISTORICAL COMMISSION
Office of the Secretary, Boston

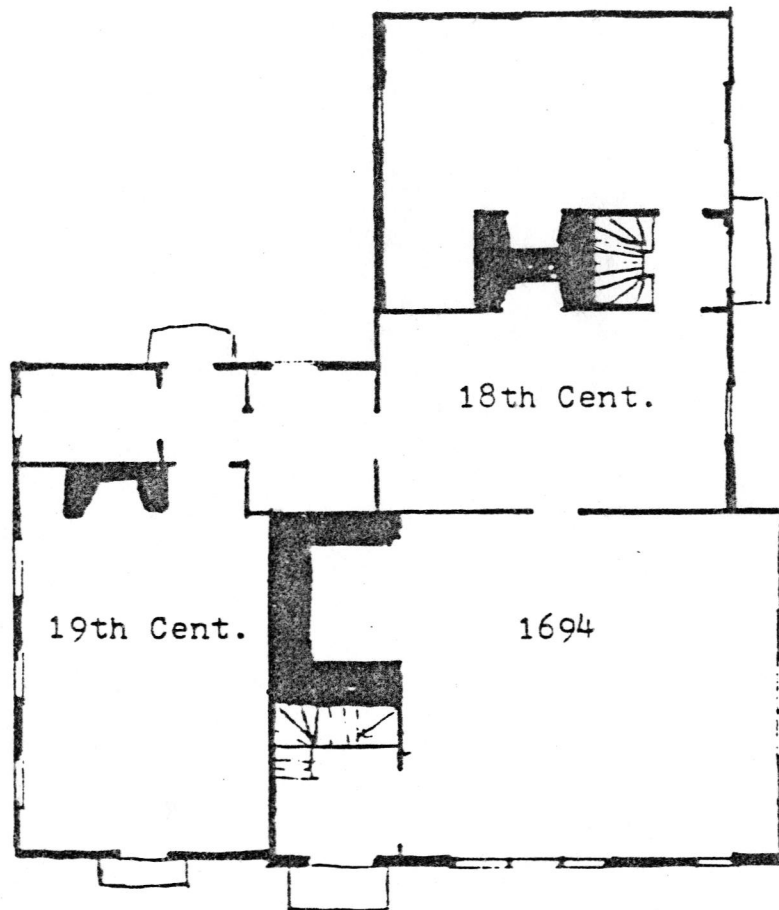
Community: WATERTOWN	Form No: 104-10
Property Name: Abraham Browne House	

Indicate each item on inventory form which is being continued below.

For further information, see references listed below, and SPNEA files.

REFERENCES

1. Abbott L. Cummings, Framed Houses of Massachusetts Bay, 1625-1725, (Cambridge, Harvard Press, 1979), p. 187.
2. Cummings Framed Houses, pp. 170.
3. Cummings Framed Houses, pp. 145, 152, 172, 196.
4. Cummings Framed Houses, p. 182, 185.
5. Cummings, Framed Houses, p. 172, photo 175.
6. Abbott L. Cummings, ed. Architecture in Colonial Massachusetts vol. 51, Publications of the Colonial Society of Massachusetts, (Charlottesville, Va.: Univ. of Va. Press, 1979), pp. 188-9; Charles Hosmer, Jr., The Presence of the Past (NY: Putnam, 1965), pp. 246-50.



BROWNE HOUSE 1694, 18th and 19th Cents.
562 Main St.
Watertown, Mass.
(not drawn to scale,
partitions approximated)



1985.

18th c. addition. 1985.

1st floor chimney. 1985.

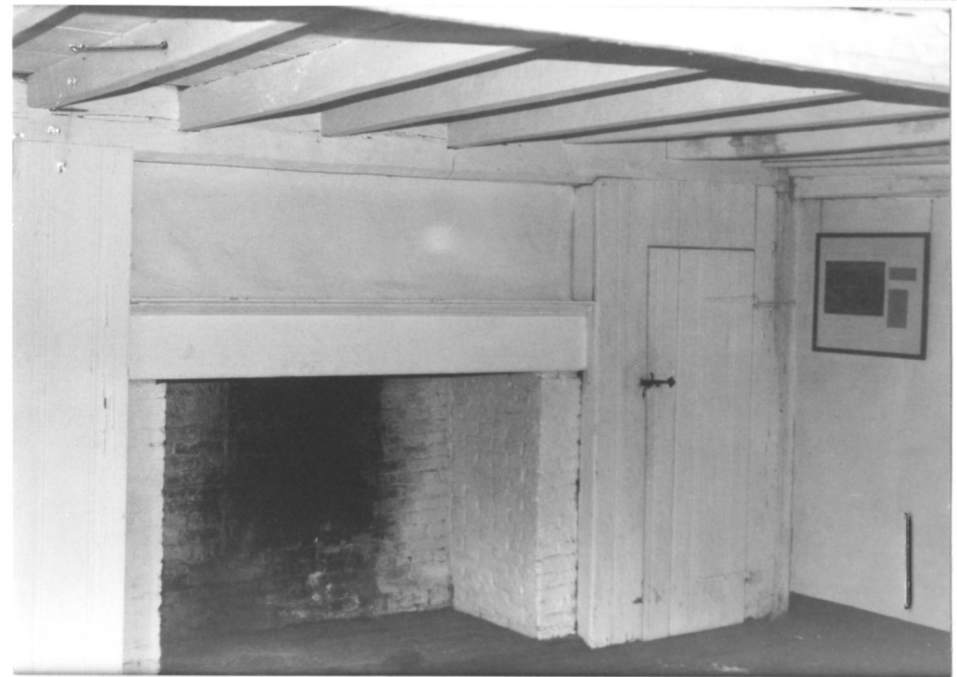


Derby Barn. 1985.

Browne House with Attachments



Transverse summer - 1st floor. 1985.



Chamber chimney wall. 1985.



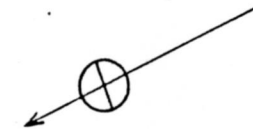
Transverse summer. 1985.

SECTION BLOCKS 6 & 9

7
10

2
199515

BLOCK 9



WATERTOWN, MA
ABRAHAM BROWNE HOUSE
562 MAIN ST.
1" = 80'

2A
215302

STREET

AC
T
I
O
N
S
T

JENSEN ROAD

JENSEN ROAD
(DO NOT SCALE)

78 C 30 39 5281	64 30 39 5281	60 30 39 5281	86 30 39 5281	81 30 39 5281	76 30 39 5281	72 30 39 5281	68 30 39 5281	63 30 39 5281	30 39 5281
30 39 5281	30 39 5281	30 39 5281	30 39 5281	30 39 5281	30 39 5281	30 39 5281	30 39 5281	30 39 5281	30 39 5281
31	37	33	39	35	31	27	23	19	15
31	37	33	39	35	31	27	23	19	15

Browne House with Attachments



CITY OF WATERTOWN

Historical Commission

Administration Building

149 Main Street

WATERTOWN, MASSACHUSETTS 02472

Elise Loukas, Chairperson
Susan Steele, Member
Marilynne K. Roach, Member
Joseph Panto, Member
Matthew Walter, Member
Richard Glenn, Member
Edward McCourt, Member

October 16, 2023

Jodi Black
Katherine Pomplum
Historic New England
151 Essex St.
Haverhill, MA 01832

Dear Ms. Black,

I am pleased to provide this letter from the Watertown Historical Commission in support of Historic New England's application to fund a consultant to conduct a structural analysis at the Browne House in Watertown.

The Historical Commission did not need to make a determination of historical significance of your project as the Browne House, located on Main Street in Watertown, is on the Historical Register. The Browne House is clearly historical and an asset to the history of the City of Watertown.

Your presentation to the Historical Commission about the Browne House's need for a structural analysis was interesting and compelling. You explained that the Browne House was built in 1694 and 1701 for a farming family and still contains rare surviving architectural features from the late 1600s. When Historic New England founder William Sumner Appleton acquired the house in 1919, thereby saving it from demolition, the Browne House was in a state of decline. You informed us that the house was restored in what is acknowledged to be the first fully documented restoration in America.

As you explained, currently the beams on the second floor of the house are shored with temporary materials. Historic New England proposal seeks funds for an engineer to analyze the structure and create working construction documents.

The Historical Commission unanimously agreed to support Historic New England's project and thank you and Historic New England's dedication to preserving Watertown's historical assets.

Sincerely,

Elise Loukas / LF

Elise Loukas, Chair

Please clarify what the CPA request would be used for to verify it would not be used for construction administration.

No CPA funds will be used for construction administration. The CPA request will be spent entirely on the engineer's analysis of repair options and development of detailed plans and specifications for the future repair project. Fees for cost analysis, permitting, or other administration will be covered by Historic England's share.

Explain why you would not be able to do the work if not for CPA funds, in other words demonstrate need.

Browne House has a modest restricted endowment that helps offset but does not cover our operating expenses. The draw from the endowment for the fiscal year ending March 31, 2023 was \$1,213, while actual operating expenses for Browne House for the fiscal year ending March 31, 2023 totaled \$55,836. To fund preservation work and capital projects at Browne House, Historic New England must seek additional outside support. Recent examples include the preservation of the Browne House barn, a project that received a \$50,000 matching grant from the Massachusetts Historical Commission in 2020.

Historic New England's professional preservation staff have identified the following priority projects to pursue at Browne House over the next 5-8 years: repair of structural deficiencies, landscape restoration, repairs to the cladding and details on the east elevation, staining the entire house, and restoration of the missing portico on the barn. Combined, this work may exceed \$450,000. With only a small endowment to support Browne House costs, this work plan will need auxiliary funding and support to ensure the projects can be prioritized and completed in an appropriate time span.

Clarify the hours and dates for admittance of visitors.

Browne House is open to the public on select weekends in the spring, summer, and fall. The schedule is determined in advance by Historic New England's visitor experience team and shared in full on our website ahead of the museum season. In 2023, Browne House was open on the following days: March 18 and 19, April 22 and 23, May 20 and 21, June 3, July 15 and 16, September 16 and 17, and November 18. Guided tours were offered four times each day, at 11:00 AM, 12:00 PM, 1:00 PM, and 2:00 PM.

Browne House welcomed 341 visitors in 2023. Tours were primarily made up of Watertown residents, Historic New England members, students, and preservationists.

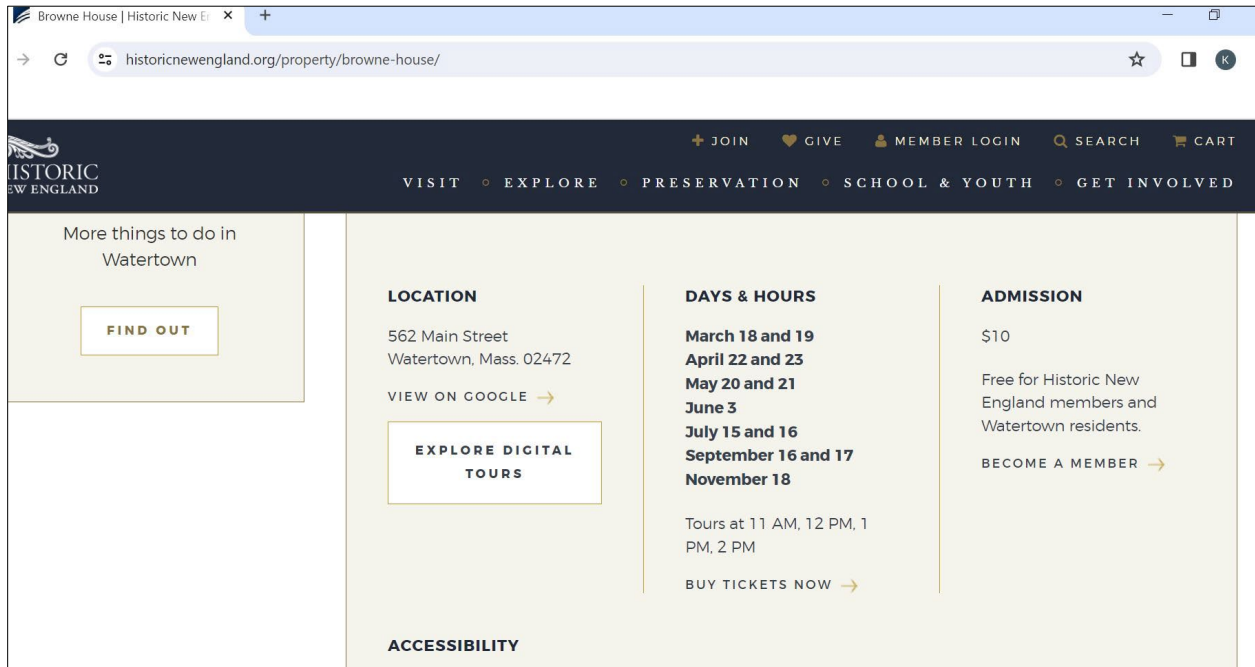
In 2024, Browne house will be open on May 18 and 19, June 1 and 16, July 6 and 7, August 3 and 4, September 21 and 22, and October 5 and 6, again with tours offered on the hour at 11:00 AM, 12:00 PM, 1:00 PM, and 2:00 PM.

What does Historic New England do to reach out and inform Watertown residents about the Browne House and its place in Watertown's history? Also, what steps are taken to make residents aware of free admittance for Watertown residents?

Historic New England has developed a great relationship with the Watertown Historical Society and is actively building a relationship with the Watertown Library. In 2024, Browne House's open hours will be

posted in their newsletter. Other planned outreach includes promoting Browne House’s schedule online via the Watertown “Wicked Local” event listings page.

Free admittance for Watertown residents is noted front-and-center on the Browne House page of Historic New England’s website (<https://www.historicnewengland.org/property/browne-house/>). See screenshot below:



CPA Funding Application

Applications are due by the deadline posted on the Watertown Community Preservation Committee website watertown-ma.gov/CPC.

After receiving notification of project eligibility, applicants must complete the CPA Funding application online, complete and upload the CPA Application Budget, and upload any other required attachments.

If your project involves municipal property, state procurement laws apply. Please go to technical assistance information and review the article, *Do the State's Procurement Laws Apply to CPA Projects?* regarding public procurement laws at communitypreservation.org/procurement

Is your application complete? Use the Submission Requirements Checklist to ensure all required materials are included in your application. Incomplete applications may be delayed or denied funding.

PROJECT INFORMATION

Scots' Charitable Society Lot Fence Restoration

▲ PROJECT NAME

Legal Address: 580 Mount Auburn Street, Cambridge, MA 02138. Project Address is in Watertown.

▲ PROJECT LOCATION (PROVIDE EXACT ADDRESS)

▲ PROJECT ACREAGE

Proprietors of Mount Auburn Cemetery

▲ LEGAL PROPERTY OWNER OF RECORD

The Friends of Mount Auburn are looking to restore one of our most iconic iron fences that memorialize over 200 individuals- the Scots' Charitable Society Lot Fence, the iron and granite posts of which have fallen into disrepair after years of exposure to the elements.

▲ PROJECT DESCRIPTION (ONE SENTENCE)

Project Eligibility: Check at least one of the boxes below. See CPA Allowable Spending Purposes on page 7.

	Open Space	Outdoor Recreation	Community Housing	Historic Preservation
Acquire	☐	☐	☐	☐
Create	☐	☐	☐	☐
Preserve	☐	☐	☐	☒
Rehabilitate/ Restore*	If acquired or created with CPA Funds ☐	☐	If acquired or created with CPA Funds ☐	☒
Support			☐	

Estimated Start Date 05/01/24 /

Estimated Completion Date 12/01/24 /

CPA Funding Request \$ 300,000

Non-CPA Funding \$ 482,700

TOTAL Budget for Project \$ 782,700

APPLICANT INFORMATION

Friends of Mount Auburn Cemetery

▲ APPLICANT NAME



CITY DEPARTMENT



CITY COMMISSION/COMMITTEE.

▲ ORGANIZATION



NON-PROFIT



PRIVATE GROUP OR INDIVIDUAL

▲ CO-APPLICANT NAME



CITY DEPARTMENT



CITY COMMISSION/COMMITTEE.

▲ ORGANIZATION



NON-PROFIT



PRIVATE GROUP OR INDIVIDUAL

Andrew Gambardella

▲ PRIMARY CONTACT PERSON

580 Mount Auburn Street, Cambridge, MA 02138

▲ MAILING ADDRESS

+1 (203) 915-8939

▲ PHONE NUMBER

agambardella@moutauburn.org

▲ EMAIL ADDRESS

Gus Fraser

▲ PROJECT MANAGER

580 Mount Auburn Street, Cambridge, MA 02138

▲ MAILING ADDRESS

+1 (617) 607-8959

▲ PHONE NUMBER

gfraser@moubtauburn.org

▲ EMAIL ADDRESS

PROJECT NARRATIVE

Describe the project and how you plan to accomplish it. ▼

The restoration of the fence focuses on two elements- the granite bases and the cast iron itself. Previous attempts at repair by encasing the bases in concrete have hastened deterioration and they are now irreparable. The position of the threaded iron rods into the corners of the granite bases has also proven to be detrimental over time and revision will seek to anchor the rods into the center of the bases. In order to replace the bases, the fence will need to be dismantled and removed to a cast iron restoration shop. Lead paint will be stripped from the entire fence, and the fence will be repainted prior to being shipped and reassembled on site. Mount Auburn has engaged and received bids from contractors for both the masonry and iron work required to be done while respecting the final resting places of over 200 Scottish immigrants buried within the lot.

How does this project meet the general priorities and specific funding category goals outlined in the CP Plan? ▼

While much of Watertown has been redeveloped and certain histories have been lost, Mount Auburn is a vast window into the past of the 19th and 20th centuries- a resting place for many early Americans innovators and industrious citizens. Mount Auburn qualifies under the CPA's goal of supporting the preservation of privately-owned historic resources that provide a distinctive benefit to the community. The restored Scots' Fence will be available for the public to engage with as an insight into this important past. Through the CPA's engagement process with the town, Watertown residents identified the restoration of cemeteries and monuments as a unique opportunity for CPA historic preservation funds. The Scots' Fence represents both a cultural and socio-economic history and an architecturally significant landmark (designed by architect Theodore Voelckers) of Watertown and Greater Boston that makes it a historic resource.

Why is this project needed and what are the public benefits? Who will be served by this project—e.g. particular demographic population or city district? ▼

According to the inspection report provided by Foster Architecture, who completed an assessment of the fence in 2022 after Mount Auburn received a matching grant from the National Trust for Historic Preservation, if the Scots' Charitable Society Lot Fence does not get restored, the iron columns attached to the broken granite bases are in danger of shifting and breaking further. Mount Auburn has its gates open to over 200,000 annual visitors, many of whom are Watertown residents. Mount Auburn has made it a priority to reach out to the surrounding Watertown community, within the past few years having collaborations with the Mosesian Center for the Arts and the Watertown Free Public Library to display the work of our Artists-in-Residence, and participating in the Watertown Arts Market and Faire on the Square to promote our public programming to residents.

Have you sought input or support from any boards, commissions, committees, community groups, or individuals?
If so, please provide details▼

Mount Auburn met with the Watertown Historical Commission during their September 14, 2023 meeting to discuss the background, importance, and need for funding of the Scots' Lot Fence restoration project. After the presentation, the members unanimously agreed to offer a letter of support to Mount Auburn for this work. Over the past few years, Mount Auburn has been in conversation with the Scots' Charitable Society in Boston about the project. Massachusetts State Representative Steven Owens toured the project location with Mount Auburn staff and got insight into the history and educational potential of the Scots' project. His letter of support is attached to this application.

How does this project incorporate universal design and comply with accessibility regulations (ADA/MAAB)? ▼

While the interior of the lot itself is not accessible to enter, the exterior fence is on the corner of two roads navigable by car and other accessibility vehicles. Recently, Mount Auburn has engaged the Institute for Human Centered Design to learn more about our landscape's accessibility and possible improvements specifically around our signature SOLSTICE event in December, but we plan on incorporating this knowledge over the next several years along with our DEIB committee to make Mount Auburn in general more welcoming to all. Mount Auburn is also an MCC Universal Participation (UP) designated organization dedicated to increasing accessibility.

How does this project incorporate environmental sustainability? ▼

The project involves the safe removal of lead paint from the iron fence offsite. Additionally, apart from the restoration of the fence, horticultural improvements will be made within the lot itself with Scottish themed plants. This eco-diversity not only contributes to the aesthetic of lots, but will also comply with Mount Auburn's Climate Action & Sustainability Plan which was adopted in 2021. This Plan builds upon decades of ecologically sensitive best practices to further reduce the impacts of Mount Auburn's landscape maintenance, burial, and cremation activities, and aims to make Mount Auburn carbon neutral by 2050. The Plan also outlines goals to create a resilient and healthy ecosystem that benefits Mount Auburn's flora and fauna while ensuring that all staff and visitors are valued, respected, and engaged.

PROJECT MANAGEMENT

Describe the qualifications and experience of key project professionals: project manager, design professionals, and other key consultants participating to successfully complete the project. ▼

Gus Fraser, V.P. of Preservation and Facilities will manage the project for Mount Auburn Cemetery. Mr. Fraser has a Masters degree in Historic Preservation from Boston University and 30 years of preservation experience – first as a preservation contractor, and for the last 23 years at Mount Auburn Cemetery. Mount Auburn has hired Foster Architecture and will work closely with principal and owner Ryan Foster. Ryan was principal at McGinley Kalsow & Associates for 13 years. While at McGinley Kalsow he was also principal architect for preservation of Mount Auburn's Egyptian Revival Gateway and Cast Iron Fence. Erik Christensen of Foster Architecture will provide additional on-site Construction Administration support.

Describe the roles, responsibilities, and time allocation of team members involved in the project. For example: who will manage the finances, who will oversee the project scope, and who will maintain the resource after project completion? ▼

Mr. Fraser will oversee the project budget and manage the work of the contractors while on site. Mr. Foster and Mr. Christensen will provide Construction Administration services and participate in regular project meetings with the contractors. Scope will be managed collaboratively to ensure the design specifications are met. Mount Auburn Cemetery and its monument preservation staff will maintain the fence for the Scots Charitable Society.

PROJECT SCHEDULE

Outline the project timeline, including the milestones and key steps necessary to successfully complete the project. (Note: CPA funding disbursements and project reporting may correspond to these milestones.) ▼

The total duration of the construction phase of this project is approximately 7 months. The project start date is contingent on successful fundraising. Once funding is secured the project team will hold a kickoff meeting to finalize the schedule. Site preparation and removal of the fence will take approximately 1 month. The fence will be removed to the cast iron contractor's workshop, where repairs, painting prep and final painting will take place over approximately five months. While the fence is away, the masonry contractor will repair the granite fence posts and complete sitework at the corner of Walnut and Fir Avenues. Reinstallation of the fence is expected to take approximately 1 month.

FEASIBILITY

Detail your process for obtaining required permits, variances, environmental assessments, deed restrictions, or other legal assurances in a timely fashion. Are there any known or potential barriers/impediments to project implementation? ▼

There are no known barriers or impediments to implementation. Mount Auburn Cemetery is working closely with the Scots Charitable Society, owners of burial rights and stewards of the lot, to successfully fund and implement this project. All cast iron work will take place off site at the contractor's shop, and the repair of granite post bases will not require permits or variances.

Will this project be phased and require funding over multiple years? If so, please provide a timeline and anticipated funding requirements. Understand that there is no guarantee that funding will be available for multiple years. ▼

No- if the project is funded, it will not require funding over multiple years and the work itself will be done in under a year.

How would denial of CPA funding or a partial funding award affect the viability of your project? ▼

Mount Auburn seeks to go forward with the restoration project once 60% of the budget cost has been raised. While Mount Auburn has commitments from the Scots Charitable Society, is planning or has put in applications to other grant funders including the National Trust for Historic Preservation and the Massachusetts Preservation Project Fund, and is in the middle of conversations with major gift prospects with vested interest in Scottish stories in addition to an appeal mailing planned for January around the Scottish holiday Robert Burns Day, complete denial of CPA funding would stall the project. With a slight reduction to the reward, Mount Auburn may be able to secure the remaining funding in order for the project to go forward in the quoted timeline.

Is your project going to require ongoing maintenance? If yes, outline the plan and budget, identify the source of funding, and who will be responsible for ongoing oversight. The CPC cannot fund the maintenance costs for any CPA projects. ▼

Ongoing maintenance of the fence is essential to its preservation for another 160 years. Mount Auburn Cemetery's preservation team will regularly inspect the fence for damage or deterioration, and assess the condition of the paint coating. It is anticipated that the high quality shop applied coating applied during this project will last approximately 20 years. Mount Auburn will touch up areas as needed and plan for repainting the fence in situ as the existing coating deteriorates. Any incidental damage to the fence will be repaired by a qualified cast iron contractor and coordinated by the Cemetery. Ongoing maintenance of the fence will be funded through the yearly budget allocation for preservation work on the grounds funded by the Cemetery's endowment.

APPLICATION ATTACHMENTS

Attach all of the documents listed in the Submission Requirements Checklist applicable to this application.

I (we) certify that all information provided in this submission is true and correct to the best of my (our) knowledge and that no information which might reasonably affect funding has been excluded. I (we) authorize the Community Preservation Committee and/or the City of Watertown to obtain verification from any source provided.

Andrew Gambardella

CHECK HERE
TO CERTIFY 

▲ NAME

The Secretary of the Interior's Standards for Preserving Historic Structures have guided the preparation of documents for the treatment of the Scots' Charitable Society cast iron lot fence at Mount Auburn Cemetery. The goal of the project is to preserve the original historic materials, which are largely intact, by making necessary repairs to improve the long-term stability and integrity of the fence. All original details of the fence will be preserved, and the fence will continue to serve as a memorial for the more than two hundred men, women and children interred within the burial lot. The character of the fence will be retained and no intact components will be replaced in preservation of the whole. Damaging and inappropriate 20th century repairs such as cast iron welds will be removed and original mechanical connection details recreated. The original granite post bases are shattered beneath the cement parging, threatening the stability of the fence as a whole. The granite bases will be replaced in kind with granite matching the original as closely as possible in size, design, color and texture. Select original cast iron details that have been lost to time, including the crenellations on the gate pediments, will be reproduced in iron from the originals, thus matching in size and configuration. Long term preservation will be enhanced by removal of deteriorating lead-based paint back to bare metal, and complete repainting of the fence. Paint colors will match the original as determined by paint analysis completed during the assessment phase of the project.

Scotts Fence

Condition Inspection & Assessment

June 1, 2022 Review Copy

Mount Auburn Cemetery
580 Mount Auburn Street
Cambridge, MA 02115



Photo Credit: MIT <https://dome.mit.edu/handle/1721.3/34756>

 **Foster**
ARCHITECTURE
33 ARDIS LANE, WESTON, VT 05161

Scots' Charitable Society of Boston Fence

INTRODUCTION

Constructed in 1847, the Scots' Charitable Society of Boston Fence at Mount Auburn Cemetery is located on the south side of Fir Avenue at the intersection of Fir Avenue and Walnut Avenue. The lot was purchased in 1841 and in 1890 the lot was filled with 216 internments. The Scots' Charitable Society of Boston was founded in 1657 and is recognized as the oldest charitable society in the United States. There are no headstones in the lot. The cast iron fence serves as the memorial for the people buried there.

The cast iron fence is highlighted by two cast iron gates. One is centered on the north elevation, and second is centered on the east elevation. The gates have the image of St. Andrew, the Patron Saint of Scotland. The gates have decorative cast iron gables over them and are flanked by four-post cast iron columns. The four posts of the cast iron columns are set into Quincy granite bases that have been encased in concrete.

The main runs of the fence span between the four-post columns with a solid top and bottom cast iron bar supporting decorative pickets. The picket designs alternate between a Scottish thistle with an axe finial, and the cross of St. Andrew with a fleur-de-lis finial. The fence is supported by mid-span Quincy granite posts with angled support braces.

Executive Summary

The Scots' Charitable Society of Boston Fence is 175 years old and there is no record of a comprehensive restoration during the life of the fence. The majority of the cast iron elements are in good condition but have broken connections. The paint is weathered on all surfaces, and it has exposed raw cast iron that is rusting. The fence should be removed and shop restored. All embedments should be replaced with stainless steel connections. All cast iron elements should be prepped to remove all rust and repainted with a high-performance coating. We do not recommend hot dip galvanizing the fence due to the fragile nature of the fence components and the high likelihood of breakage during the hot dip galvanizing process. At the northeast corner of the fence, the grade from Walnut Avenue has been raised over the years. The granite base at the northeast corner has been buried up to the top of the base. The grade should be lowered to protect the base and the fence.

There are (8) four-post columns that have their Quincy granite bases encased in concrete. The concrete covers the bottom of the posts, and a center cast iron cross. The encased portions of the cast iron have rusted and broken the original granite bases and the encased concrete. The granite bases need to be replaced, and the cast iron posts repaired where they are embedded. The cast iron columns are constructed of four posts that connect into an arch with a cast iron cornice with

dentils. The columns are comprised of four pieces that are fastened together. Many of these fasteners are broken and the columns have shifted thusly breaking some sections.

The two cast iron gates are flanked by four-post columns. Over the gates is a cast iron gable that is connected to the two columns. The gable is constructed of two pieces that are fastened together locking the oak leaf molding and finial in place. The attachment of the two-piece gable has failed, and the gable is separating. At the north elevation gate, the movement of the gable has caused the gate to sag and no longer align with the locks. The east elevation gate is non-operable and has been fastened in place. At the north elevation gate the decorative oak leaf gable molding is missing the top section on the east side. Originally there was a cast iron finial on the top of the gable. The finial is missing. The gates and gables need to be disassembled and all existing fasteners replaced. The missing molding and finials should be replaced.

The main run of the picketed fence is supported by solid top and bottom cast iron bars with the pickets fastened through the bars. The top and bottom bars are spliced at the mid-points. At every 7th picket there is an intermediate granite support base. The intermediate granite supports, pickets, top bar, and bottom bar are in good condition. Where the top and bottom bar attach to the granite bases there is loose material that needs to be restored. The sections of rail can be removed and restored without removing the pickets from the rails. The intermediate granite bases can remain in place for the restoration.

Background:

The cast iron fence was constructed in 1847 to serve as a memorial to the people buried in the lot. The fence was constructed of cast iron and supported on granite piers. The only known work that has been performed to the fence is painting, the welding and re-support of the northeast column, and the encasing of column granite bases in concrete. There have been other minor metal repairs performed throughout the life of the fence.

Quincy Granite Bases Encased in Concrete:

The cast iron columns were originally set in square Quincy granite base stones. The rail of the fence was fastened into the granite base with a threaded rod. In the center of the granite base there is a



cast iron cross set into the base. The cast iron has started to rust where it is embedded in the granite and has caused the granite to spall at all corners. See drawing A1.4. The granite has been covered with concrete and metal lath to hold the post bases in place. A photo from the MIT Library, dated between 1954-59, shows that the concrete casings had been installed prior to the photo. At the southeast corner post the concrete has spalled off completely to expose the damaged granite base. The concrete was installed over the base of the cast iron posts and over the bottom rail connections. The concrete covering the cast iron trapped moisture on the cast iron and has caused the cast iron to rust and deteriorate. The granite bases were finished with a six-line finish where exposed above grade. There is heavy soiling and rust staining to the granite above grade. Below grade the granite bells out and is rock-faced. The granite extends more than 30" below grade and is a single piece footing. The exposed portion of granite needs to be replaced and all fasteners into the granite should be replaced with stainless steel.

Columns:

The four-post columns are constructed of three levels, see drawings A1.4 and A1.5. The bottom level is four posts that have a lion shield between them. At the top of these posts there is horizontal cross-bracing connecting the posts. The center section of the columns have gothic-arched pieces constructed from four 90 degree corner pieces. The four corner pieces make a square with an arch on each side and there is a joint at the top of the arch. The pieces are not fastened together but connected to the post below and the top section above. The top section is a square cast iron cornice with dentils and open on top. The cornice pieces are mitered together at each corner and fastened with L brackets mounted inside the column. The L bracket attachments are typically broken, and the column caps have shifted. The L brackets were fabricated to not allow for movement. All the fence connections should allow for movement because the iron in the fence expands and contracts with temperature changes.



Gates:

There are two gates located on the north and east elevations of the fence. They are the focal point of the fence and have cast sculptures of St. Andrew. Surrounding St. Andrew is “Scots’ Charitable Society – Boston” in white gothic lettering. The north elevation gate has hinges and a lock while the east elevation gate is fixed in place. The hinges on the north still work but need to be lubricated. The gates are in very good condition, but the movement of the flanking columns makes the north inoperable and misaligns the east. The gates need to be reset and need only minor touch up repairs and repainting. Above the gates is a cast iron pediment that connects the two flanking columns. In the center of the pediment are the words “Instituted A.D. 1657.” The top face of the pediment has decorative oak leaf molding. The north pediment is missing the top section on the east side. Originally there were cast iron finials at the peaks of the pediments, but both are missing. These can be seen in the MIT photo from 1954-59. The pediment is made of front and back pieces that were fastened together. The movement of the columns and the deterioration of the fasteners has caused the two sections to come apart. The pediments need to be fully disassembled with all fasteners removed. The gable needs to be fully shop-restored with new fasteners fabricated and installed. The missing finials and molding need to be replaced with new cast iron elements.

The cast iron fence is constructed with 4-post cast iron columns at each corner and framing the cast iron gates. These columns are constructed the same as the corner fence columns and are in similar condition. The columns need to be disassembled with all fasteners and connections removed.



North Elevation Gate

Fence and Pickets:

The main fence is constructed with a top and bottom cast iron rails with cast iron pickets. The picket designs alternate between a Scottish thistle with an axe finial, and the cross of St. Andrew with a fleur-de-lis finial. The bottoms of the pickets are fastened through and bolted to the bottom rail. The finials attach over the top rail. There are a few broken pieces on select finials, but the majority are in good condition. There are intermediate granite support bases that are fastened through the bottom rail with a threaded rod and bolt. The bottom rail is deteriorated at each of these connections. The attachments of the pickets to the top rail are in good condition. The top rail and bottom rail connections (to the columns) are in poor condition and have many breaks. The top and bottom rail have mid-span splices.

It is recommended that sections of fence be removed from column to splice. The pickets can remain attached to the top and bottom rail to reduce potential breakage of the pickets and finials. The bottom rail should be repaired at the granite connections. The fasteners into the granite bases should be replaced with stainless steel threaded rods and repainted. The support braces need to be restored and the connections should be replaced. The broken pickets should be repaired to match the original. The connections of the top and bottom rail to the columns should be replaced with a slotted stainless steel bolted connection. This connection needs to allow for the movement of the fence. All cast iron elements should be shop prepped and repainted.



Typical Fence

Existing Conditions Photos – General Views

Photo 01 (Overall view, North Elevation along Fir Avenue)



Photo 02 (Overall view, East Elevation along Walnut Avenue)



Photo 03 (Overall view, South Elevation along Elder Path)



Photo 04 (Overall view, West Elevation)



Photo 05 (Main entrance gate, North Elevation, labeled “Gate 2” on site plan)



Photo 06 (Decorative gate, non-operable, East Elevation, labeled “Gate 1” on Site Plan)



Photo 07 (Corner post, Northeast, labeled “F” on Site Plan)



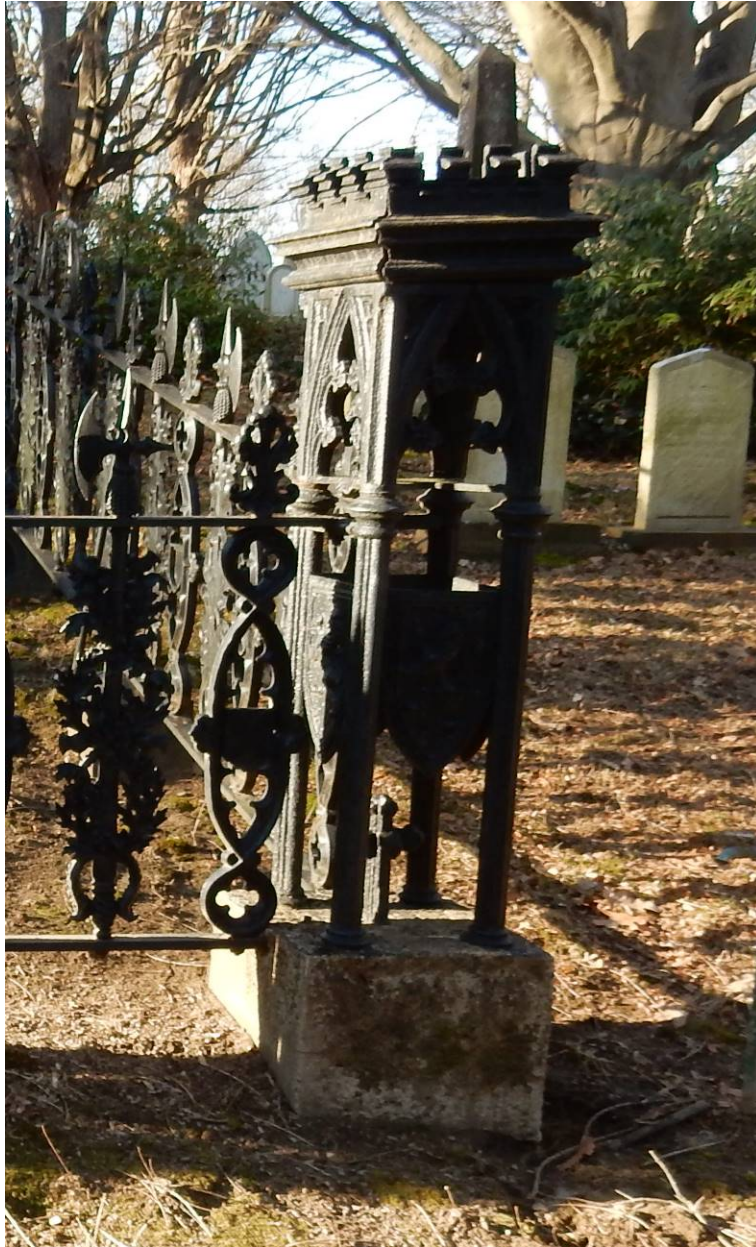
Photo 08 (Corner post, Southeast, labeled “A” on Site Plan)



Photo 09 (Corner post, Southwest, labeled “B” on Site Plan)



Photo 10 (Corner post, Northwest, labeled “C” on Site Plan)



Existing Conditions Photos – Exposed Foundations

Photo 11 (Example of exposed granite base post at corner, location “F” on Site Plan)



Photo 12 (Example of exposed granite base post at entrance gate, location “E” on Site Plan)



Photo 13 (Example of exposed granite rail base, labeled “SC2” on Site Plan)



Photo 14 (Example of granite fence bases)



Existing Conditions Photos – Damaged Concrete Bases

Photo 15 (Example of damaged concrete base, labeled “A” on Site Plan)



Photo 16 (Example of damaged concrete base, labeled “A” on Site Plan)



Photo 17 (Example of damaged concrete base, labeled “E” on Site Plan)



Photo 18 (Example of damaged concrete base, labeled “H” on Site Plan)



Existing Conditions Photos – Rail and Picket Conditions

Photo 19 (Example of top rail splice)



Photo 20 (Example of top rail splice)



Photo 21 (Example of bottom rail splice)



Photo 22 (Example of railing detached from granite fence base, labeled “SF1” on Site Plan)



Photo 23 (Example of deteriorated / missing cast iron at decorative pickets, #F7 on East Elevation)

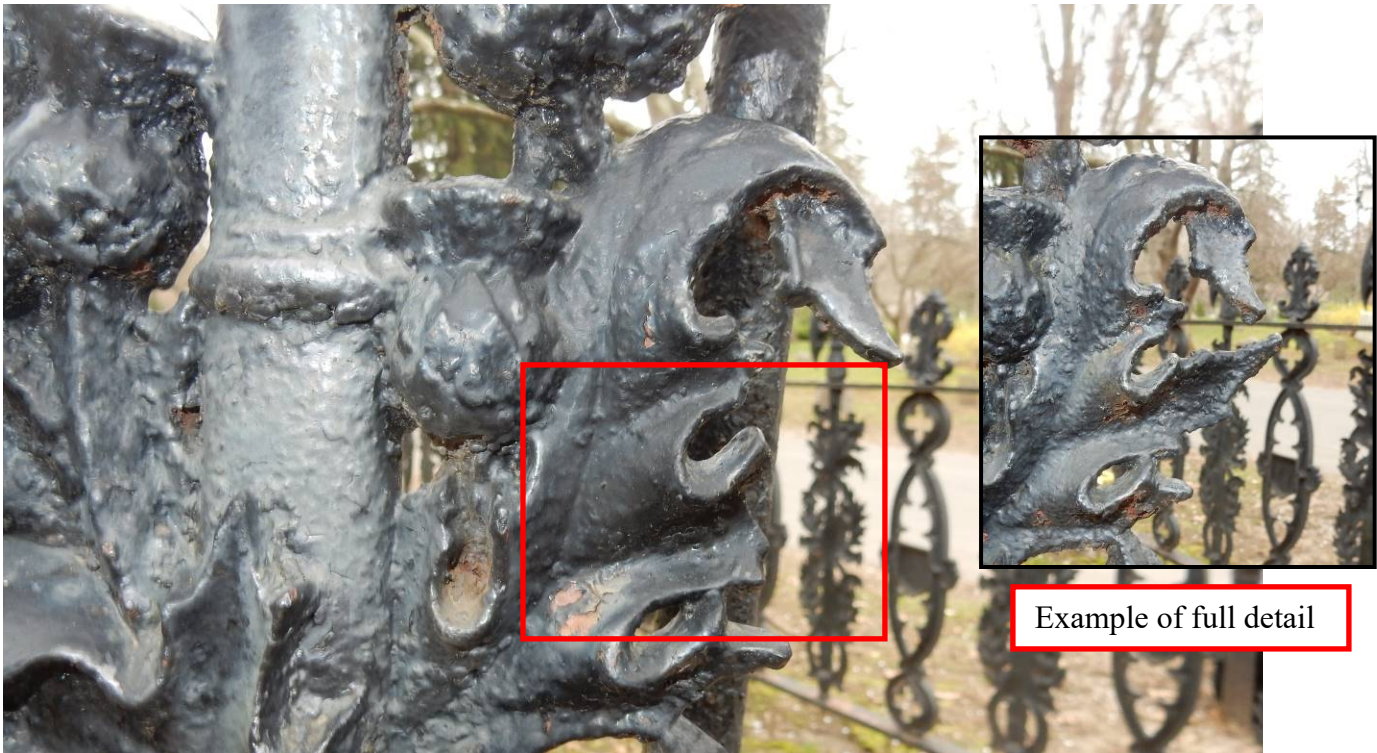


Photo 24 (Example of missing cast iron detail, #C28 on North Elevation)



Photo 25 (cracked cast iron, #H10 on East Elevation)



Photo 26 (Example of top decorative cast iron element out of plumb, #F13 on East Elevation)

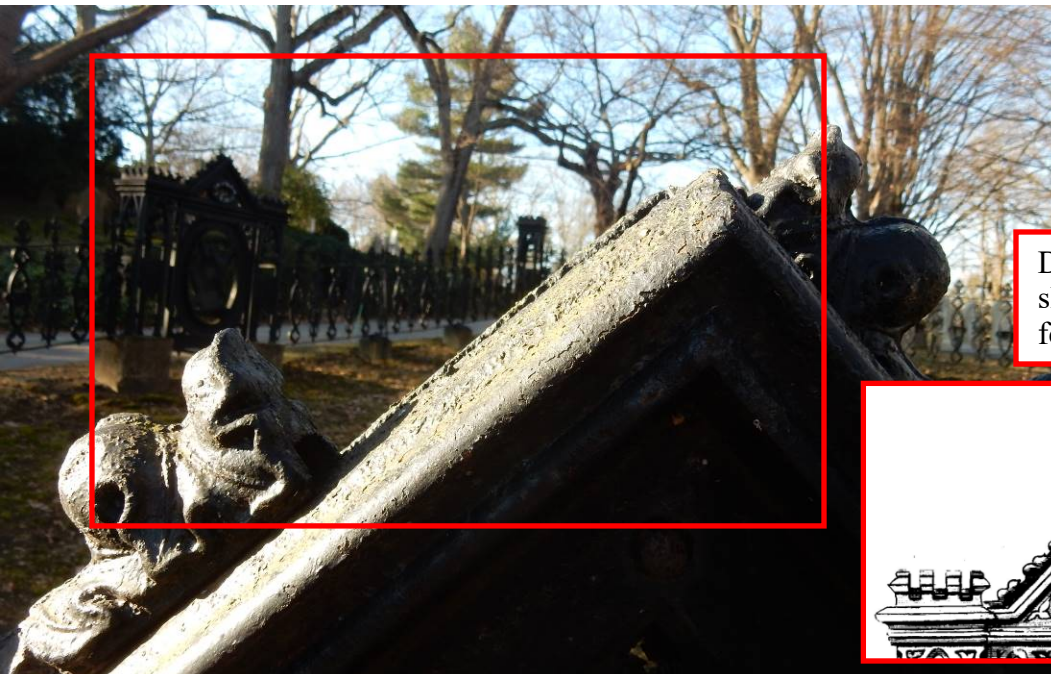


Photo 27 (Example of rusted connections at bottom rail, East Elevation)



Existing Conditions Photos – North Elevation Entrance Gate Conditions (Gate 2 on Site Plan)

Photo 28 (Example of missing cast iron elements: decorative pediment cap and finial)



Decorative finial as
shown on original
fence drawing



Photo 29 (Example of broken / missing cast iron element: crenellation)



Photo 30 (Example of broken / missing cast iron element: crenellation)

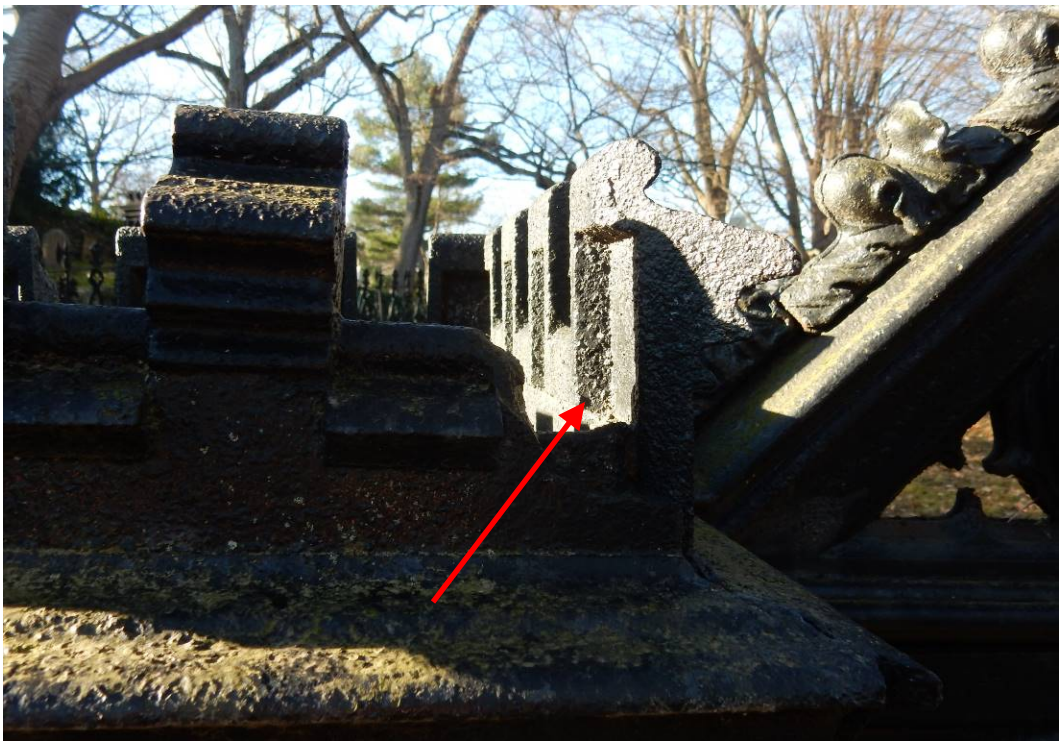


Photo 31 (Example of separated cast iron elements)



Photo 32 (Example of separated cast iron elements)



Photo 33 (Example of separated cast iron elements)



Photo 34 (Example of rust damage)



Existing Conditions Photos – East Elevation Entrance Gate Conditions (Gate 1 on Site Plan)

Photo 35 (Example of separated cast iron elements, example of missing cast iron element: finial)



Photo 36 (Example of separated cast iron elements)



Photo 37 (Example of separated cast iron elements and biological growth)



Photo 38 (Lower gate elements embedded / hidden in retrofit concrete cap)



Photo 39 (Example of rust and rust damage)



Photo 40 (Example of rust damage)



Photo 41 (Example of rust, rust damage, and biological growth)



Photo 42 (Example of rust and rust damage)



Existing Conditions Photos – Decorative Corner Posts Conditions (A, B, C, and F on Site Plan)

Photo 43 (Post A, example of separated cast iron elements)



Photo 44 (Post A, example of rust, rust damage, and details obscured by retrofit concrete cap)



Photo 45 (Post A, example of rust, rust damage, and details obscured by retrofit concrete cap)



Photo 46 (Post A, example of rust)



Photo 47 (Post A, example of rust, separated elements, elements out of alignment)



Photo 48 (Post B, example of separated elements)



Photo 49 (Post B, example of separated elements and rust)



Photo 50 (Post B, vines and landscaping covering the base)



Photo 51 (Post C, example of separated cast iron elements and elements out of alignment)



Photo 52 (Post C, example of separated cast iron elements and elements out of alignment)



Photo 53 (Post C, example of separated cast iron elements and elements out of alignment)



Photo 54 (Post C, example of missing cast iron element: crenellation)

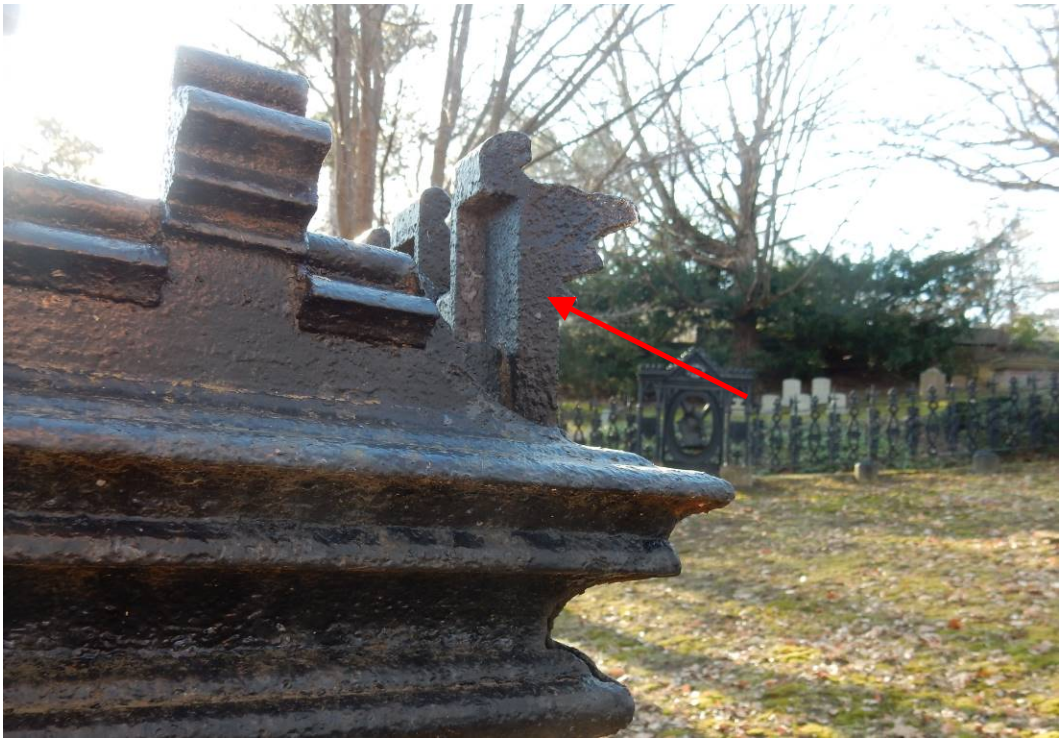


Photo 55 (Post F, example of separated cast iron elements, weld patches, rust, and missing cast iron plug)



Photo 56 (Post F, example of separated cast iron elements, biological growth, missing cast iron plugs, and missing cast iron element: crenellation)

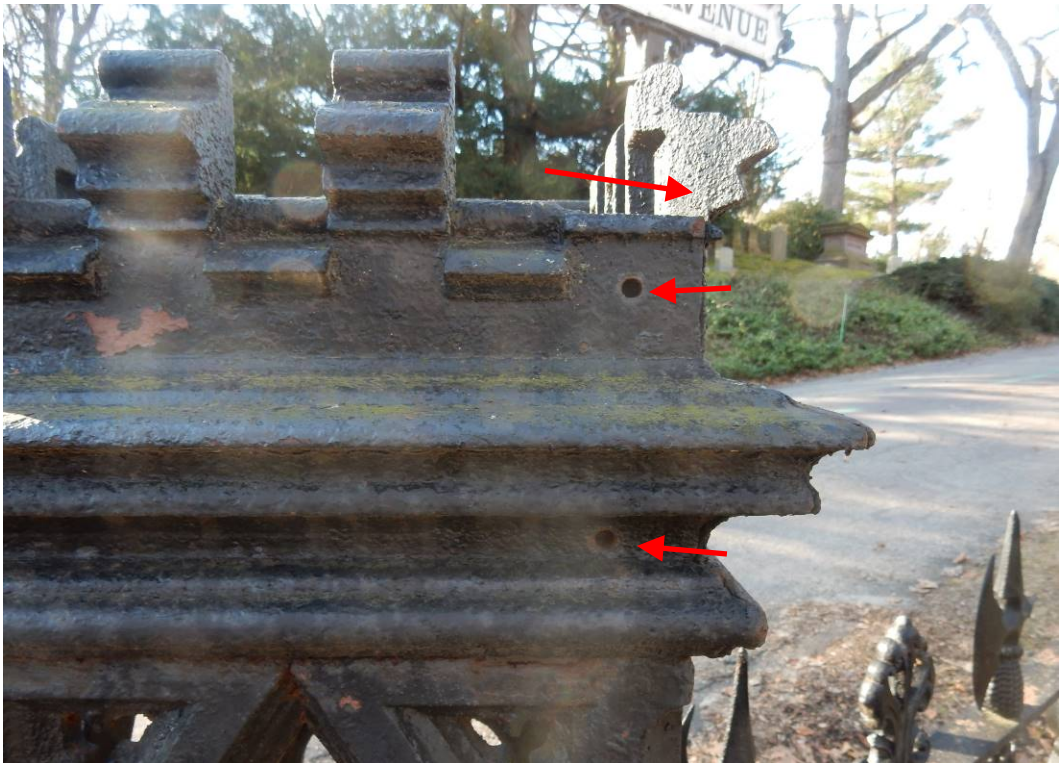


Photo 57 (Post F, example of separated cast iron elements, weld patches, and broken / missing cast iron element: crenellation)

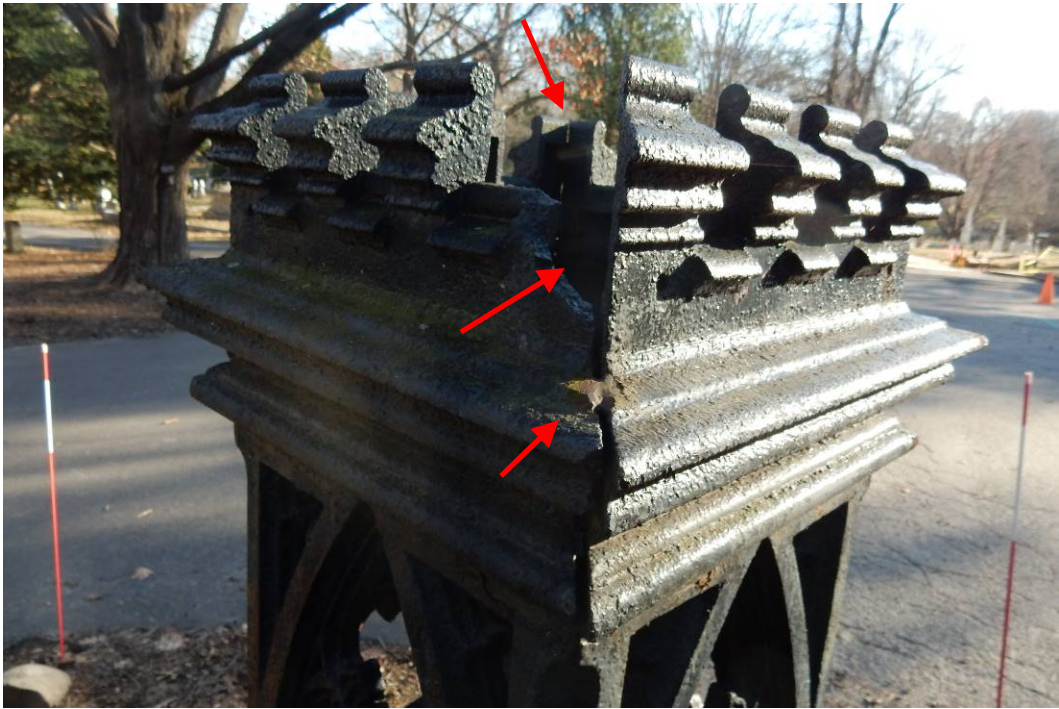


Photo 58 (Post F, example of separated cast iron elements, rust, biological growth, and broken / missing cast iron element: crenellation)

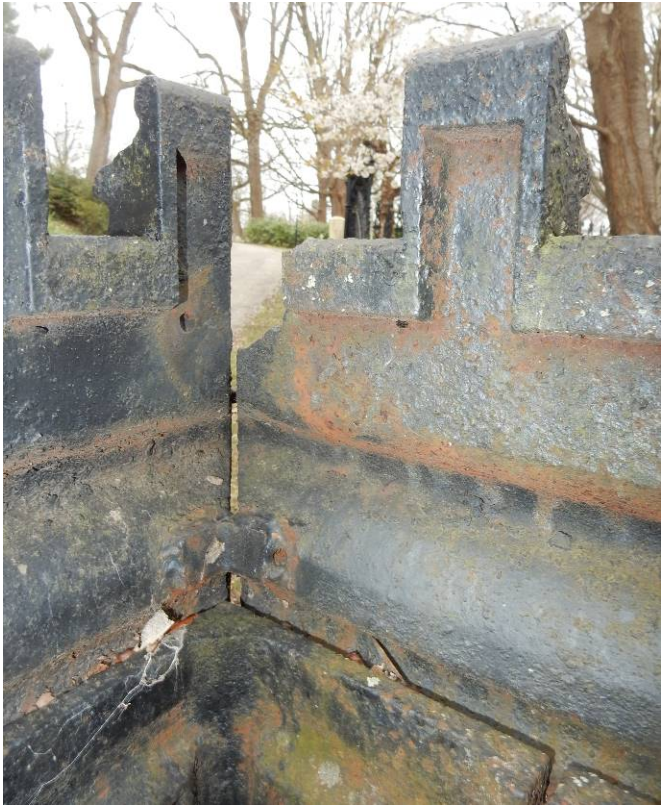
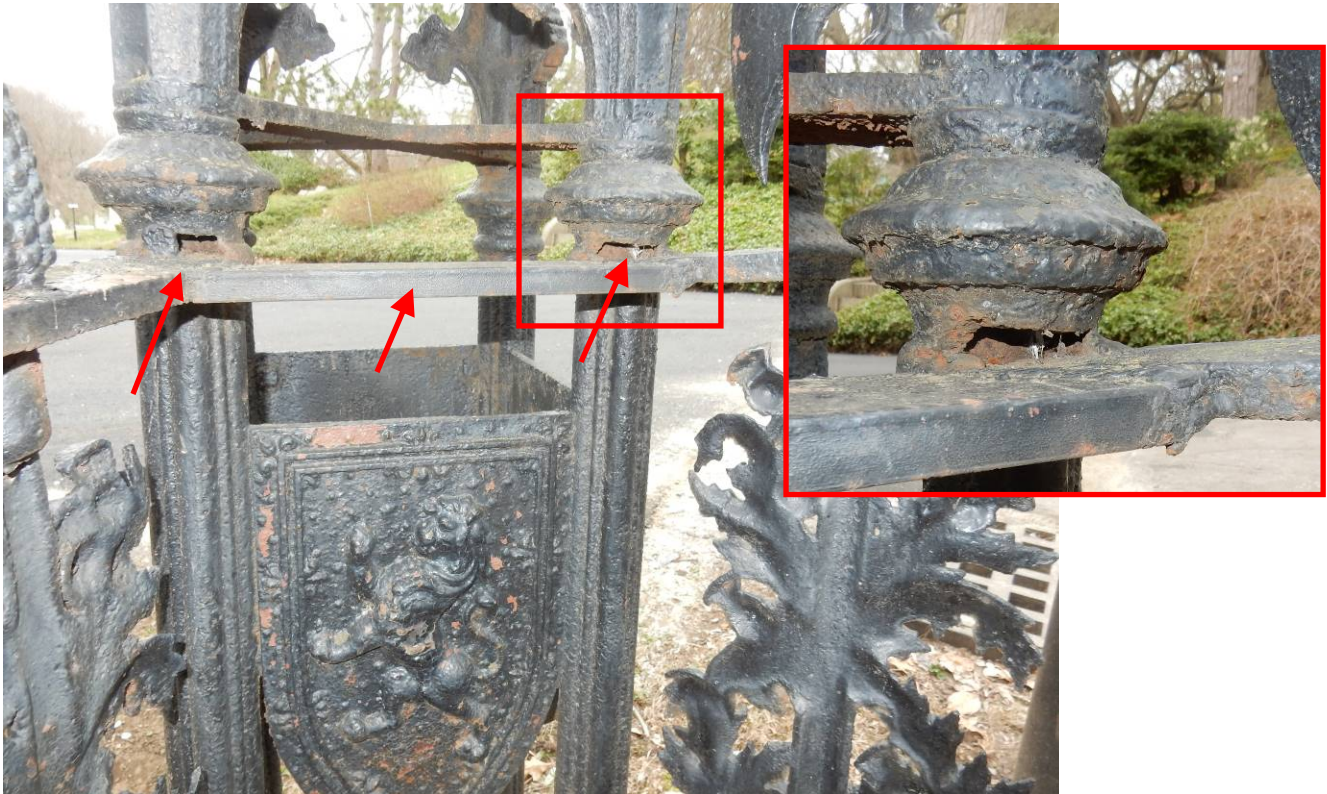


Photo 59 (Post F, example of rust)

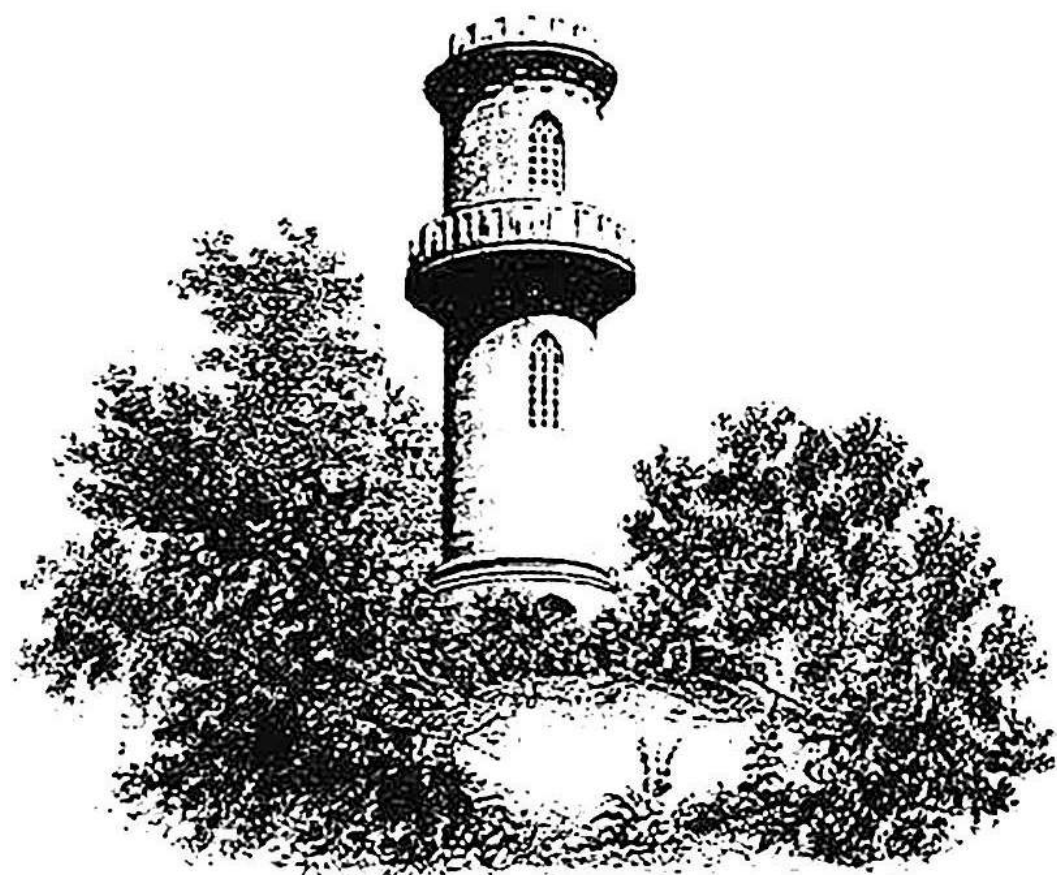


Photo 60 (Post F, example of retrofit bracing, rust, and rust damage)

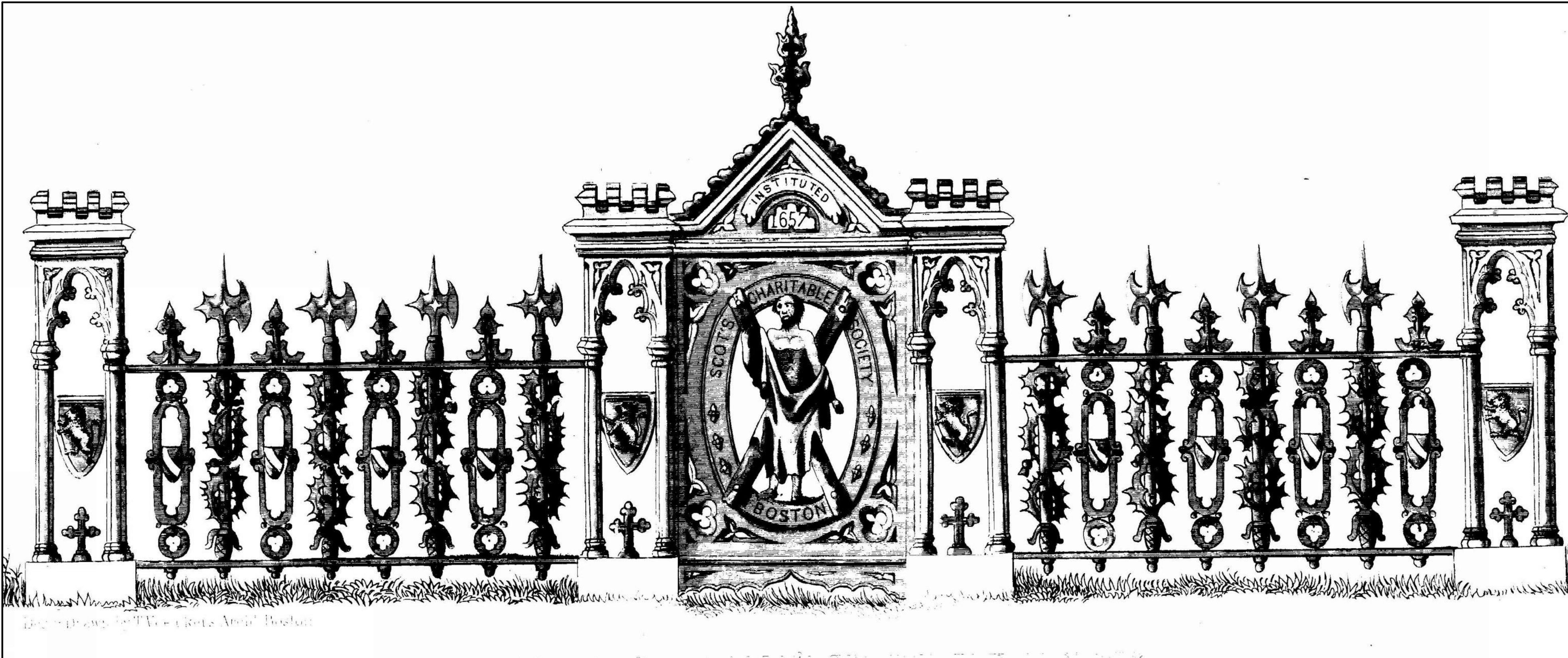


Mount Auburn Cemetery

580 Mt. Auburn St.
Cambridge, MA 02138



MOUNT AUBURN CEMETERY
A National Historic Landmark

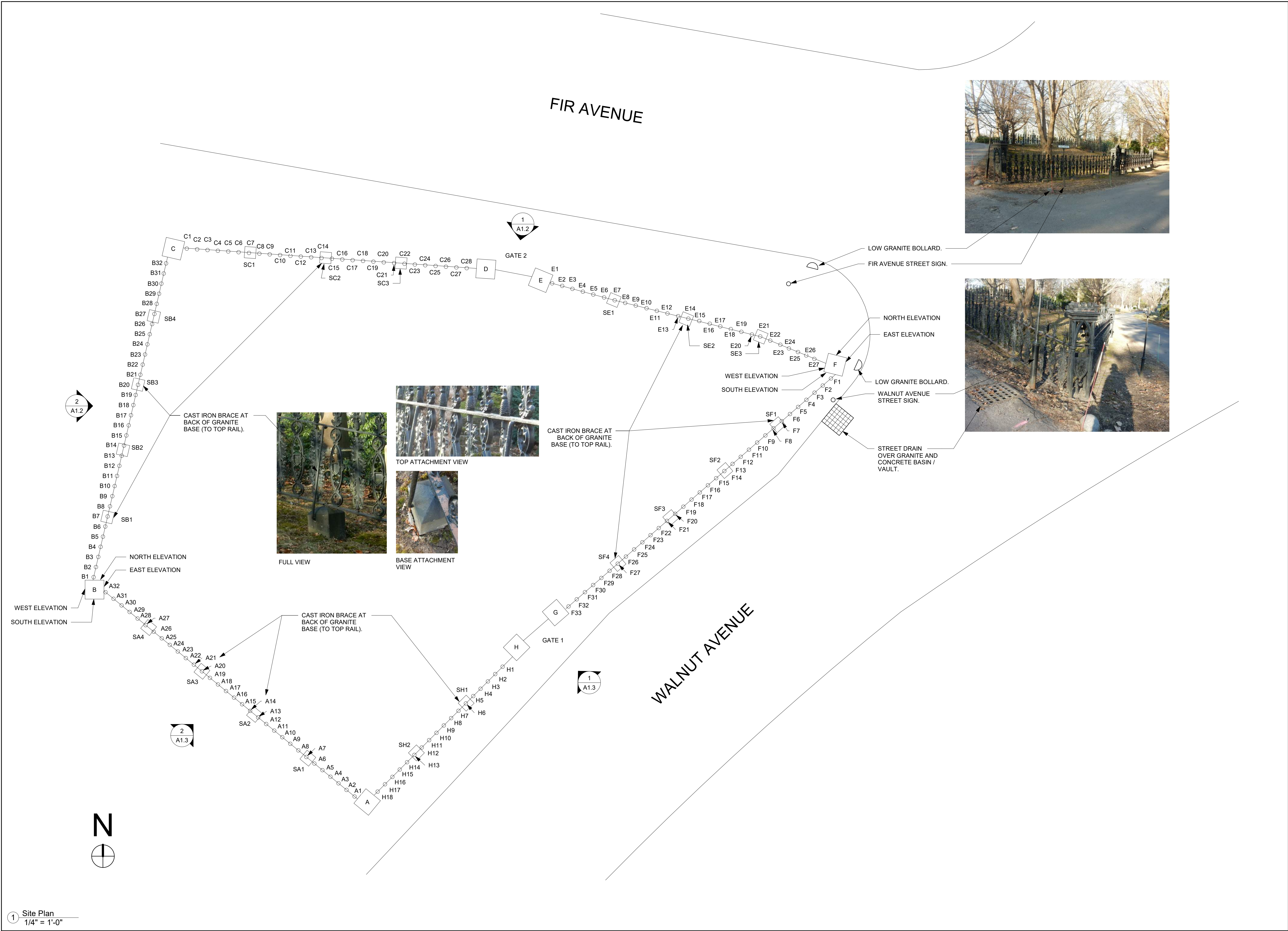


Sheet List	
Sheet Number	Sheet Name
A1.1	Site Plan
A1.2	North & West Elevations
A1.3	South & East Elevations
A1.4	Post A and Post B Elevations
A1.5	Post C and Post F Elevations
A1.6	Gate 1 - East Elevation
A1.7	Gate 2 - North Elevation
A1.8	Partial Elevations



33 Ardis Lane
Weston, VT 05161
802.345.9789
www.Foster-architecture.com





MOUNT AUBURN CEMETERY
A National Historic Landmark

Scots' Charitable Society

Lot Fence (No. 816)

580 Mt. Auburn St.

Cambridge, MA 02138

Mount Auburn Cemetery

EXISTING CONDITIONS ASSESSMENT

Date: 05/09/2022
Scale: 1/4" = 1'-0"
Drawn By: FE / EC
Reviewed By: RAF
Project No: 2021.52



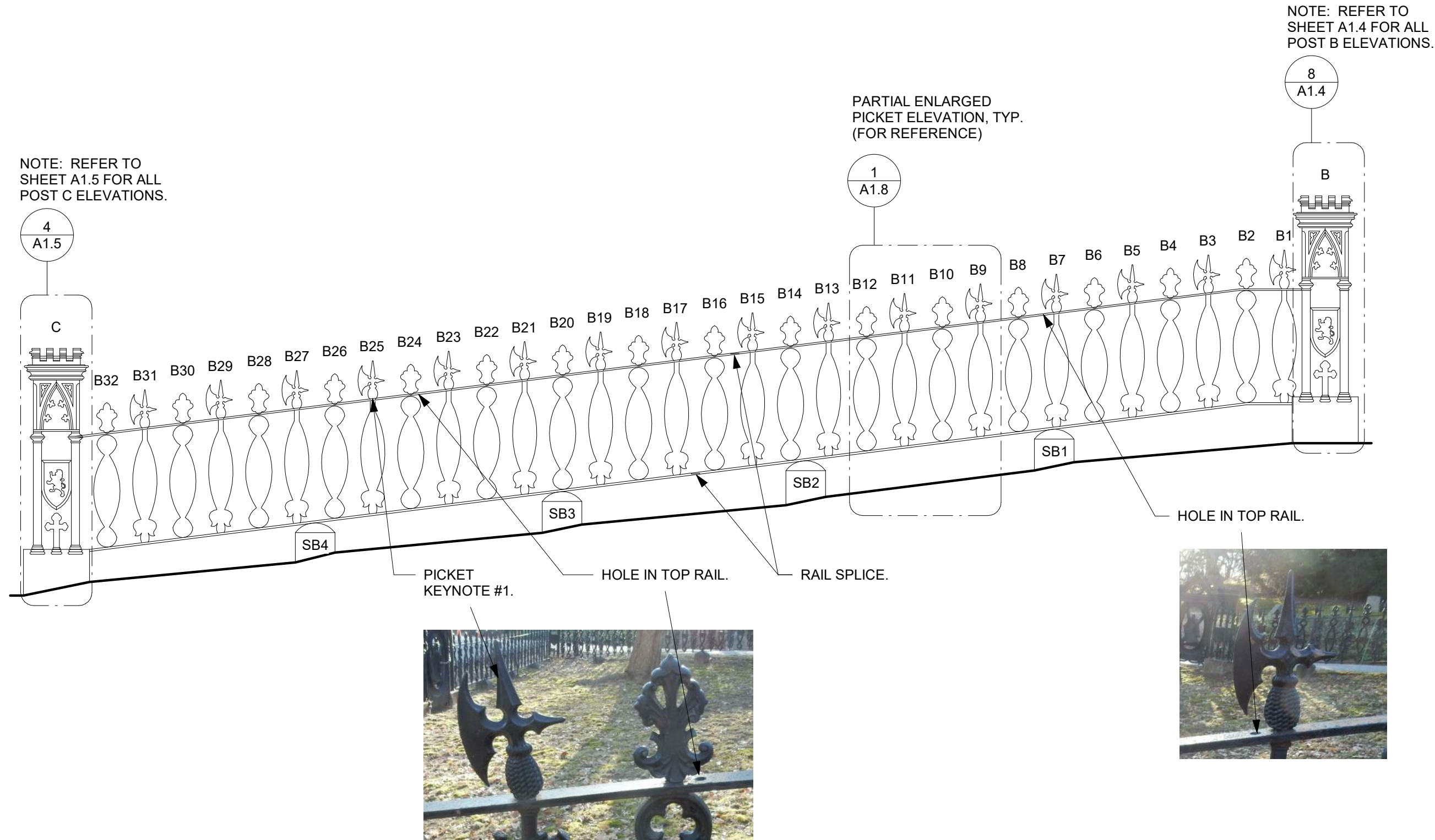
33 Ardis Lane
Weston, VT 05161
802.343.7867 - www.Foster-architecture.com

Site Plan

No.

A1.1

② West Elevation
3/8" = 1'-0"



GENERAL NOTES

1. AT POSTS A-H, THE ORIGINAL GRANITE BASE WAS COVERED WITH CONCRETE CAPS ABOVE THE GRADE PLANE. ALL CONCRETE IS CRACKED AND DETERIORATED. REFER TO ELEVATIONS FOR CONDITIONS AT EACH POST.
2. ALL PAINT HAS DETERIORATED AND IS FLAKING FROM ALL CAST IRON ELEMENTS.
- 3.

PICKET CONDITION KEYNOTES

1. TOP ELEMENT BENT OUT OF PLUMB.
2. LOSS OF CAST IRON DETAIL.



MOUNT AUBURN CEMETERY
A National Historic Landmark

Scots' Charitable Society
Lot Fence (No. 816)
580 Mt. Auburn St.
Cambridge, MA 02138
Mount Auburn Cemetery

EXISTING CONDITIONS ASSESSMENT

Date: 05/09/2022
Scale: As indicated
Drawn By: FE / EC
Reviewed By: RAF
Project No: 2021.52



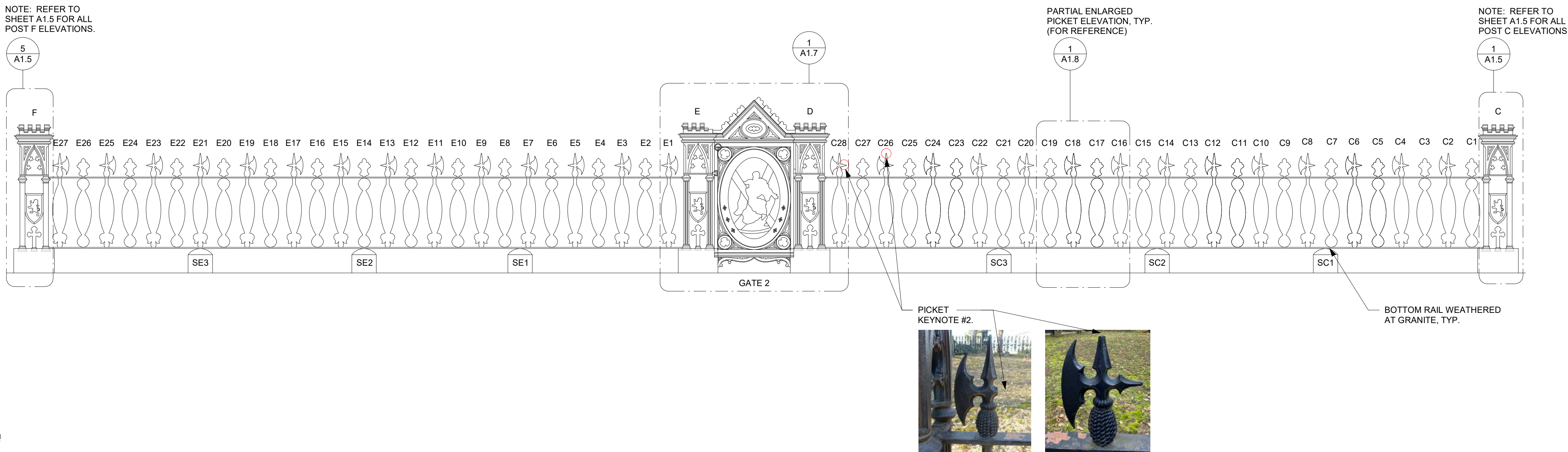
33 Ardis Lane
Weston, VT 05161
802.343.7867 - www.Foster-architecture.com

North & West Elevations

No.

A1.2

① North Elevation
3/8" = 1'-0"





Scots' Charitable Society
Lot Fence (No. 816)
580 Mt. Auburn St.
Cambridge, MA 02138
Mount Auburn Cemetery

EXISTING CONDITIONS ASSESSMENT

Date:	05/09/2022
Scale:	As indicated
Drawn By:	FE / EC
Reviewed By:	RAF
Project No:	2021.52

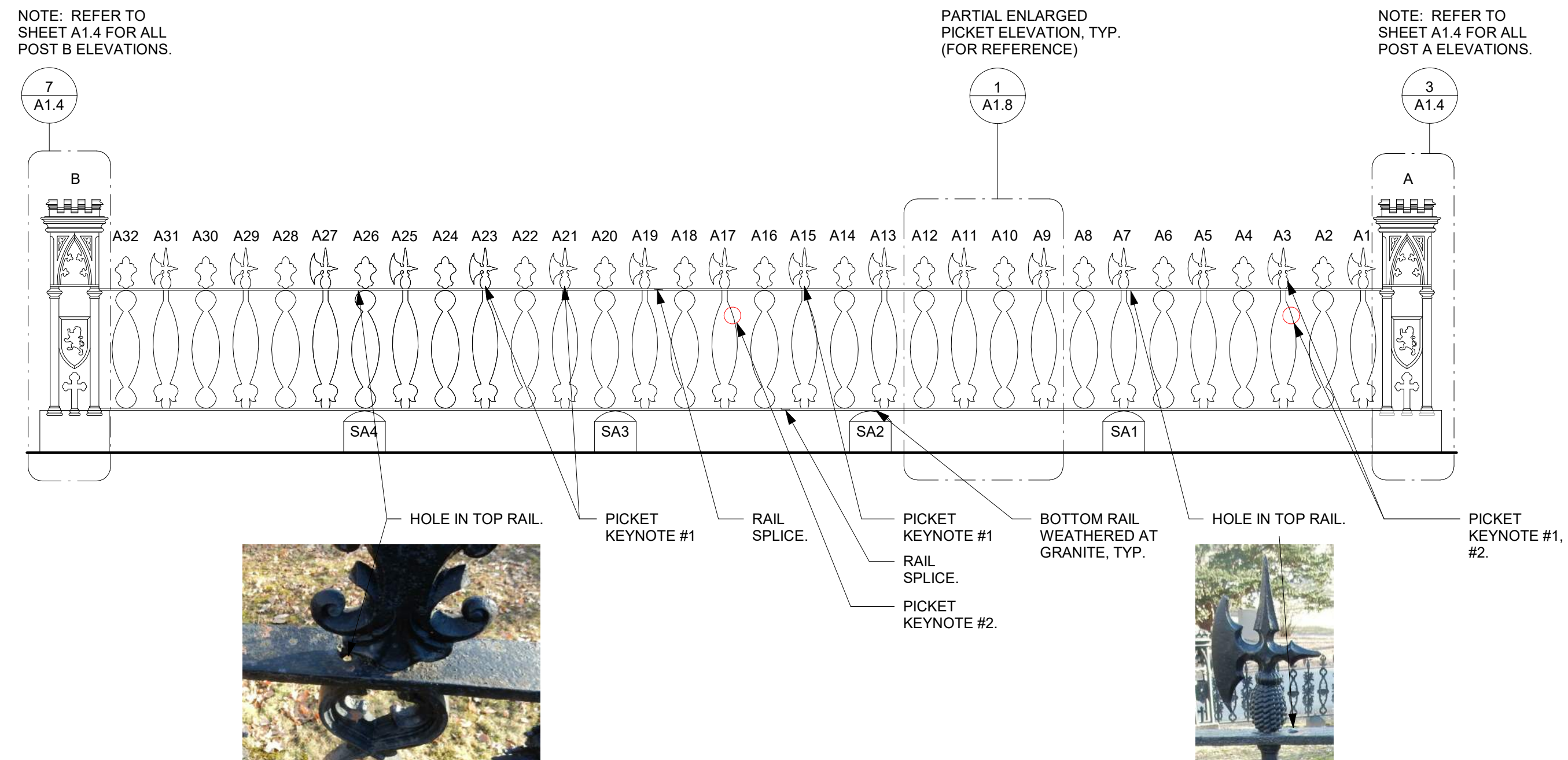


33 Ardis Lane
Weston, VT 05161
802.343.7867 - www.Foster-architecture.com

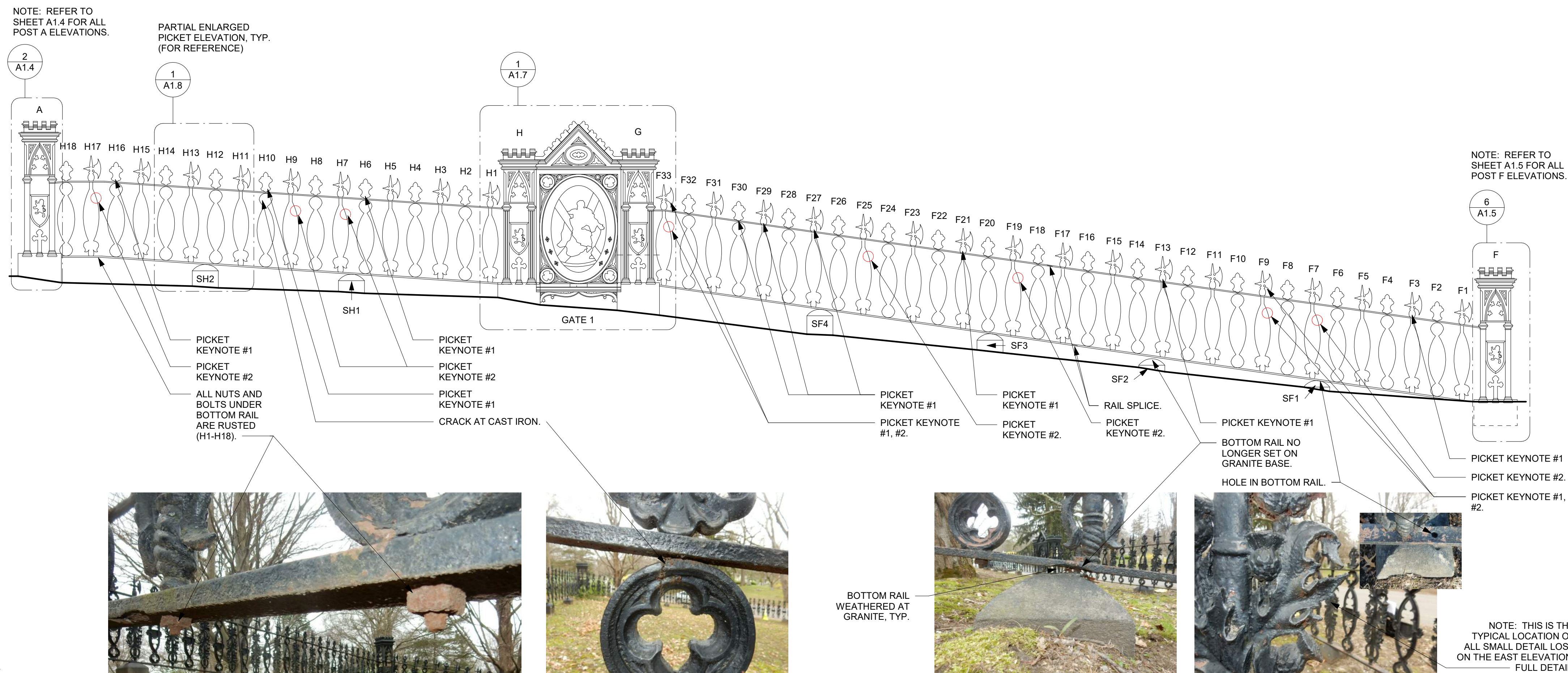
South & East Elevations

No.

A1.3



② South Elevation
 $3/8" = 1'-0"$



① East Elevation
 $3/8" = 1'-0"$

NOTE: THIS IS THE
TYPICAL LOCATION OF
ALL SMALL DETAIL LOSS
ON THE EAST ELEVATION.
FULL DETAIL.





MOUNT AUBURN CEMETERY
A National Historic Landmark

Scots' Charitable Society

Lot Fence (No. 816)

580 Mt. Auburn St.

Cambridge, MA 02138

Mount Auburn Cemetery

EXISTING CONDITIONS ASSESSMENT

Date: 05/09/2022
Scale: As indicated
Drawn By: ERC
Reviewed By: RAF
Project No: 2021.52



33 Ardis Lane
Weston, VT 05161
802.343.7867 - www.Foster-architecture.com

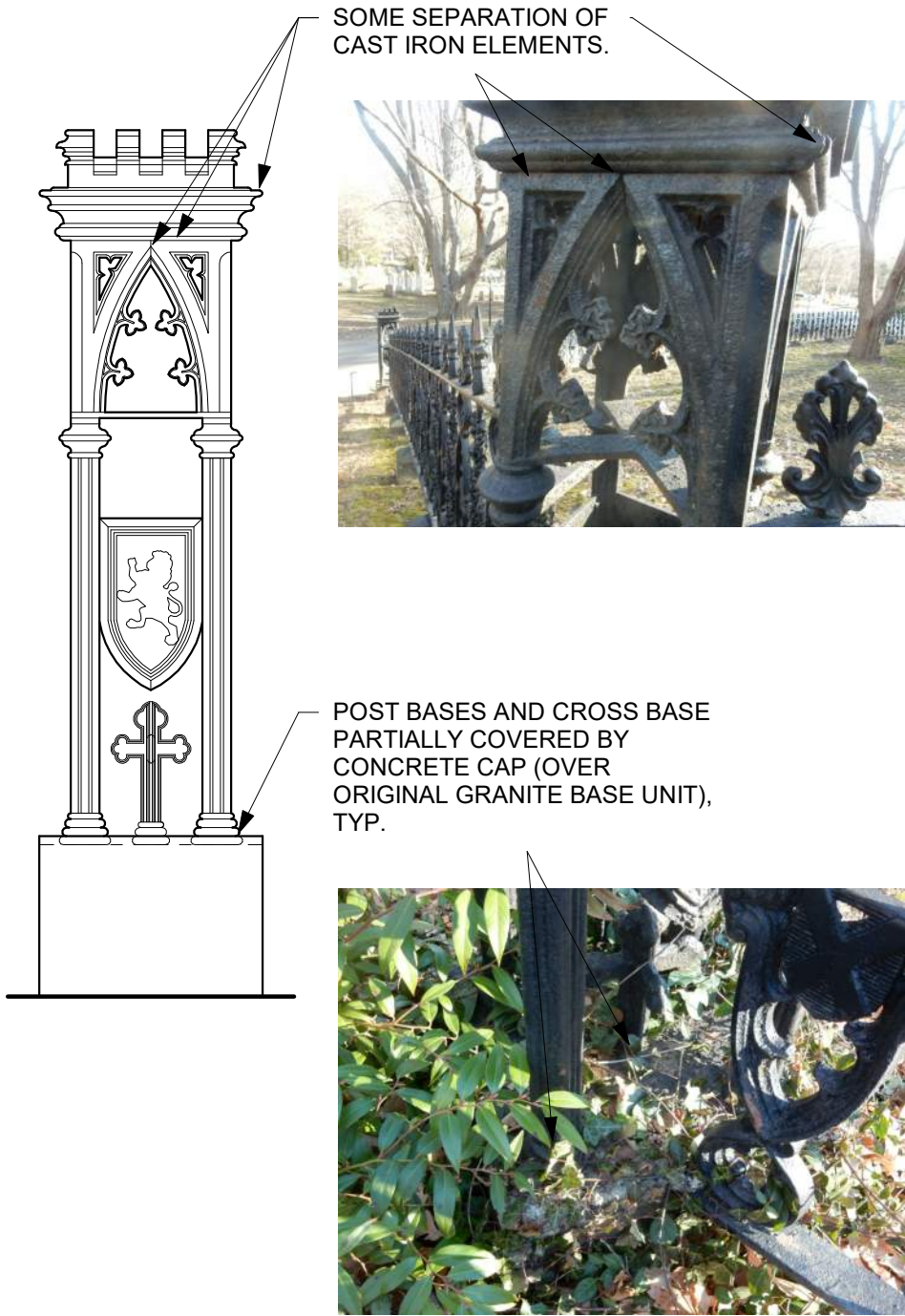
Post A and Post B Elevations

No.

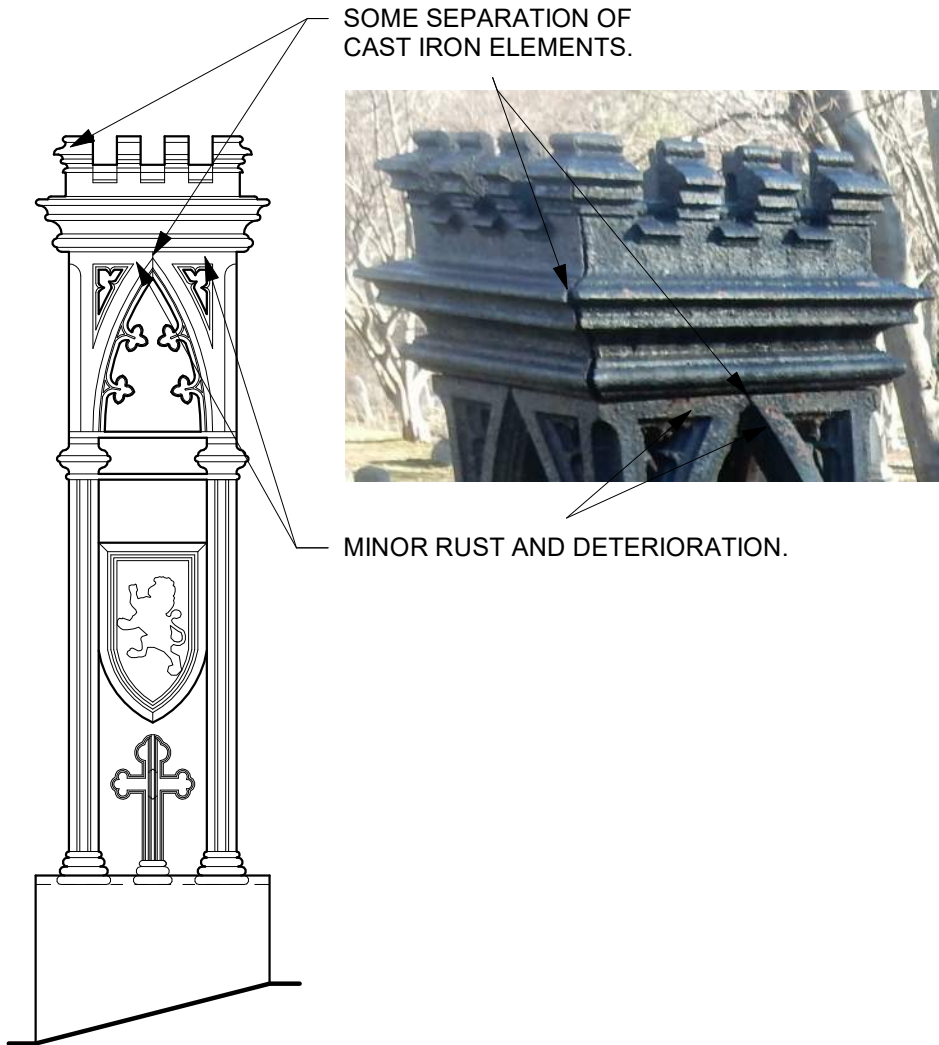
A1.4

POST B GENERAL NOTES

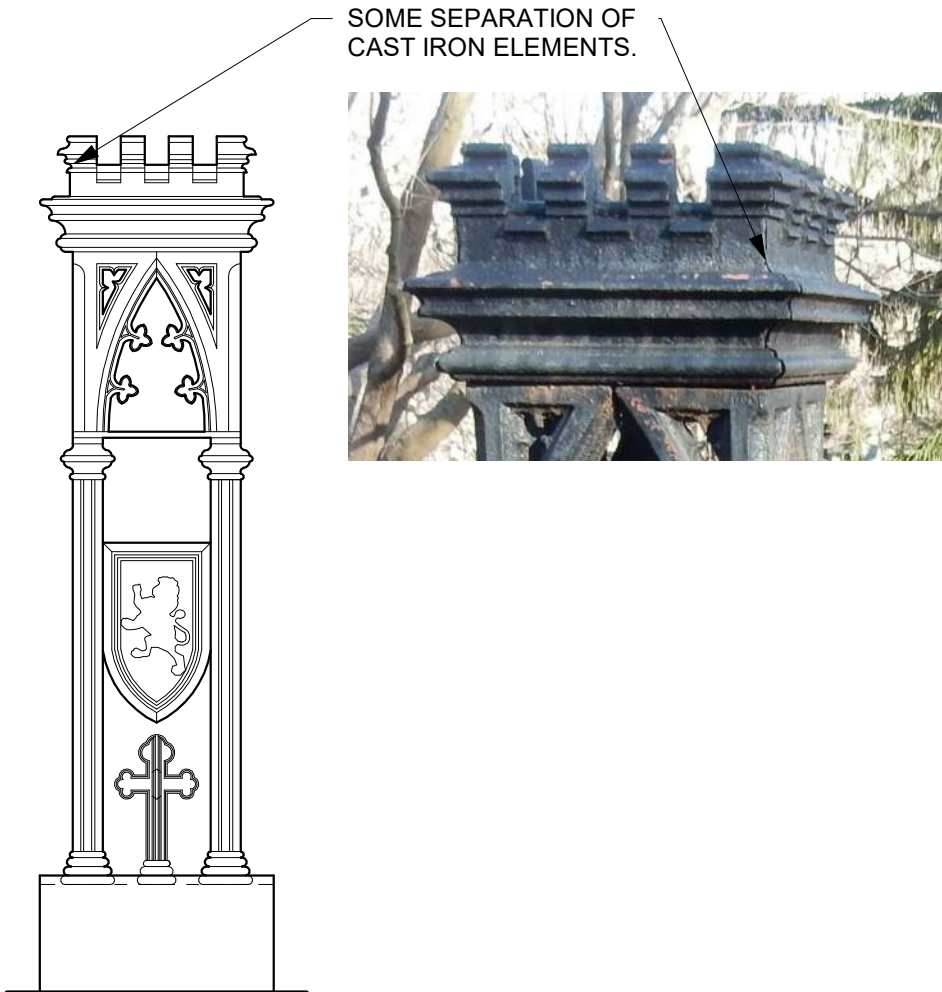
1. CONCRETE / GRANITE BASE PARTIALLY COVERED BY PLANT MATERIAL AND LANDSCAPING.
2. SOME SEPARATION OF CAST IRON ELEMENTS.
3. MINOR RUST AND DETERIORATION OF CAST IRON.
4. POST BASES AND CROSS BASE PARTIALLY COVERED BY CONCRETE CAP (OVER ORIGINAL GRANITE BASE UNIT).



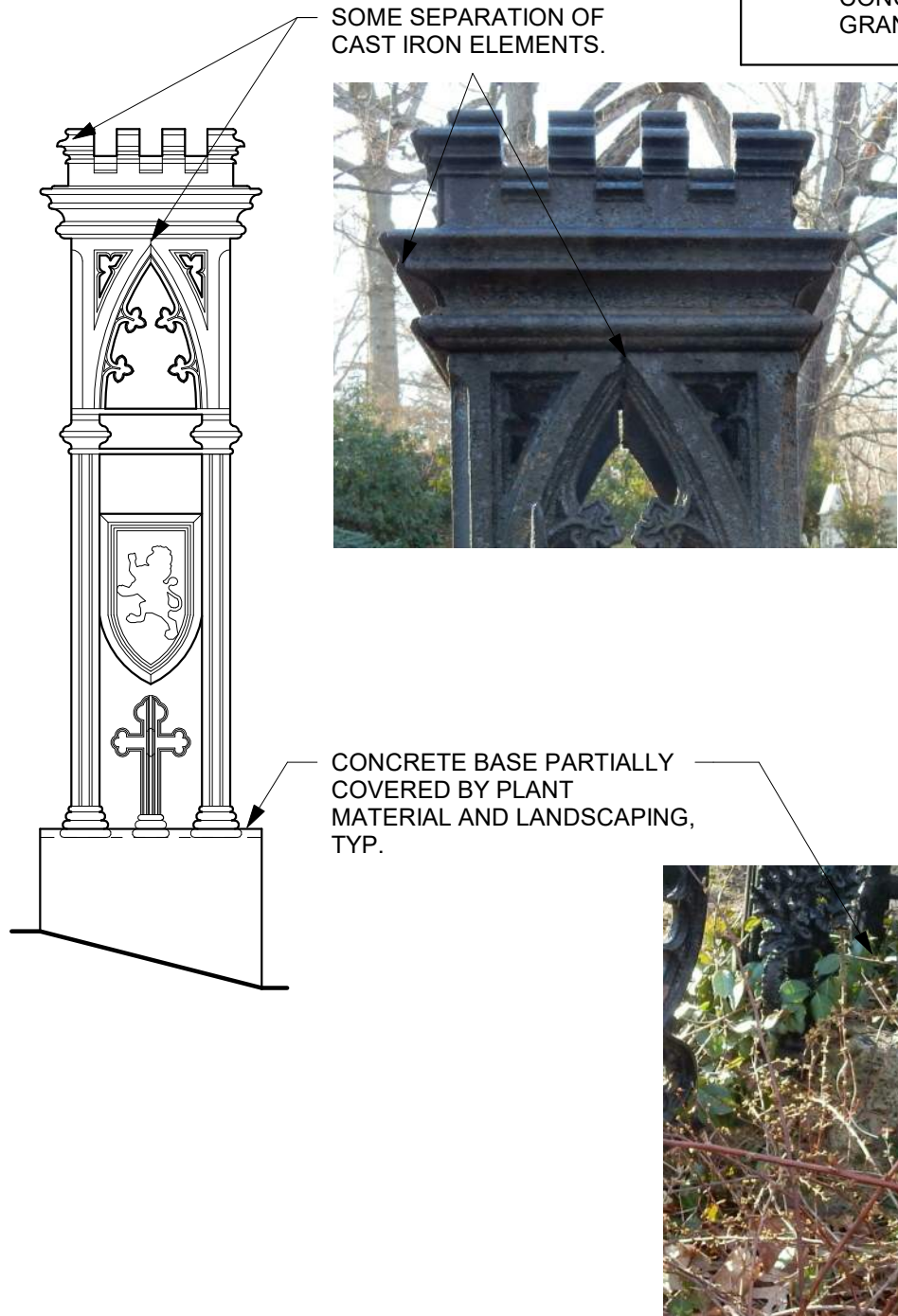
8 Post B - West Elevation
3/4" = 1'-0"



7 Post B - South Elevation
3/4" = 1'-0"



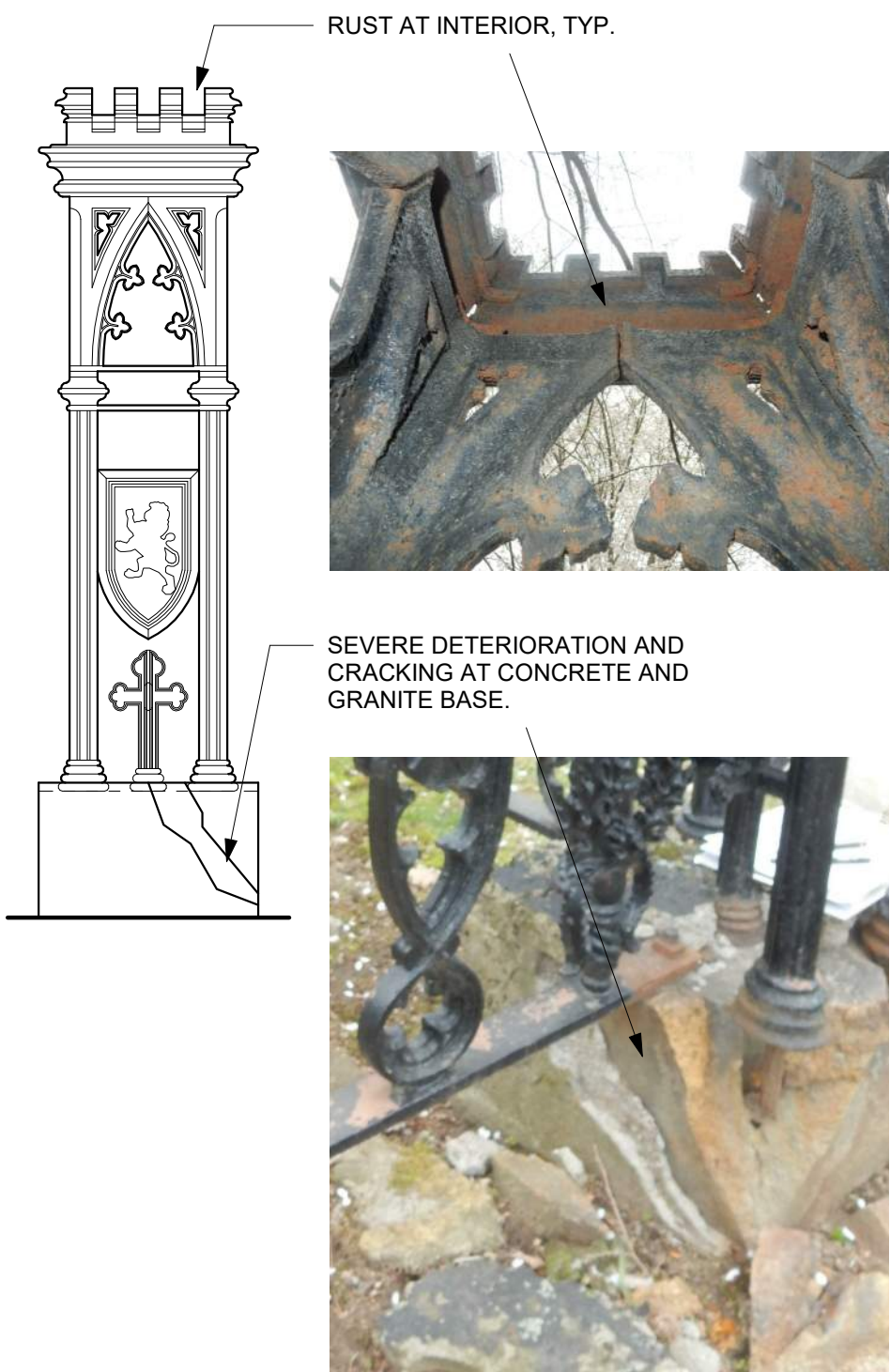
6 Post B - East Elevation
3/4" = 1'-0"



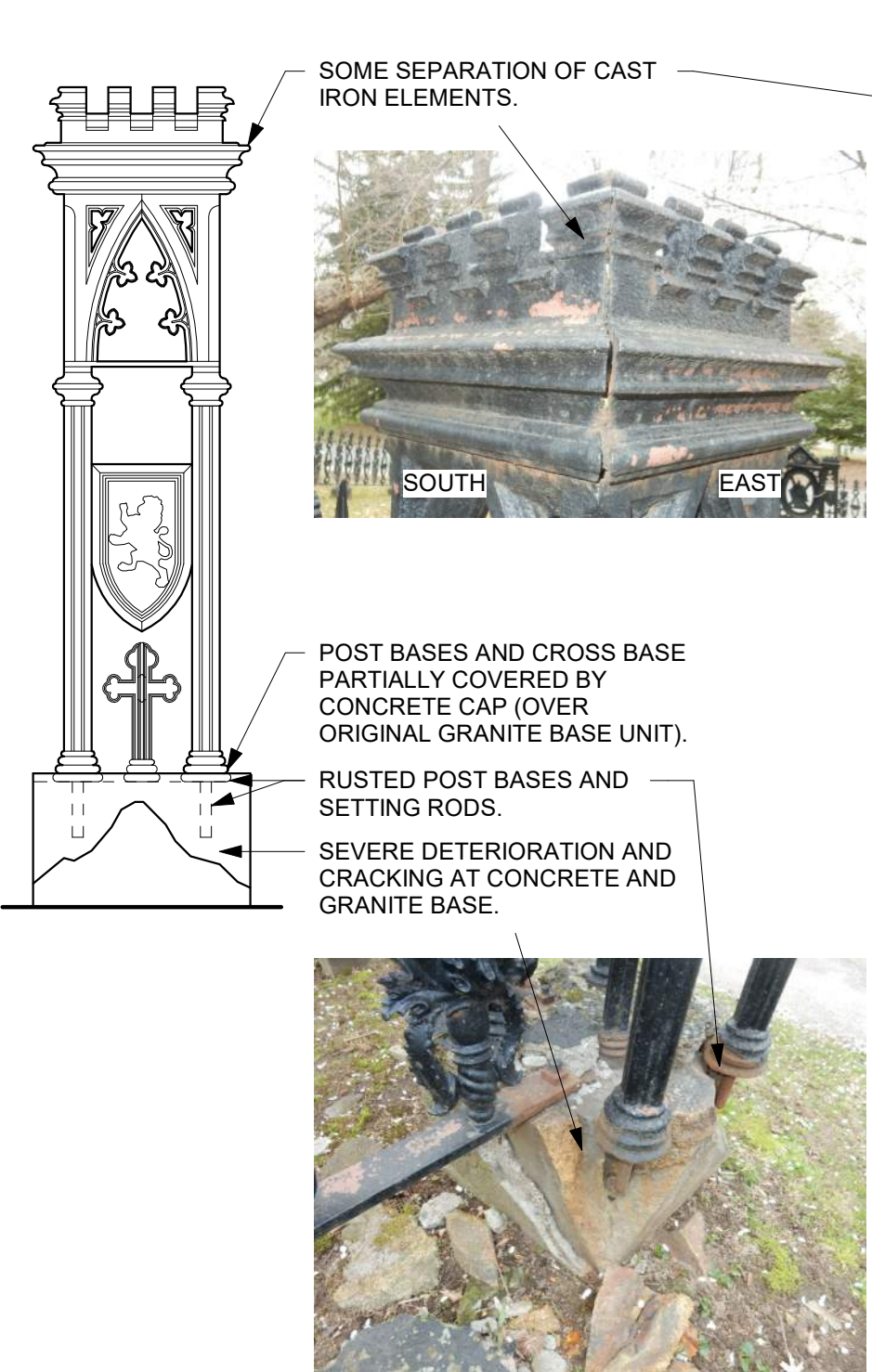
5 Post B - North Elevation
3/4" = 1'-0"

POST A GENERAL NOTES

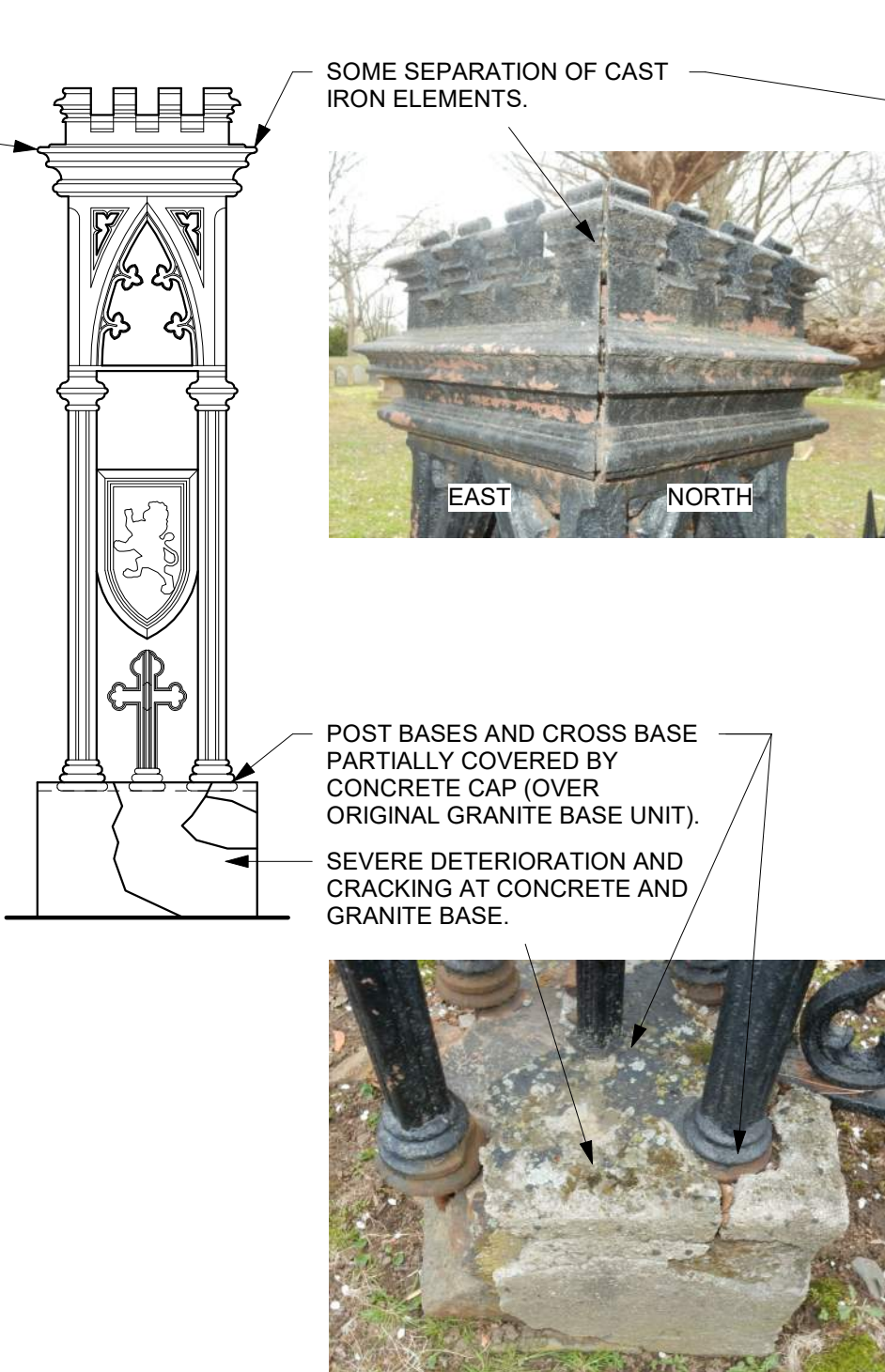
1. SEVERE CRACKING AND DETERIORATION AT CONCRETE AND GRANITE BASE.
2. NO MISSING ELEMENTS.
3. SOME SEPARATION OF CAST IRON ELEMENTS.
4. MINOR RUST AND BIOLOGICAL GROWTH (MOSTLY AT INTERIOR).
5. POST BASES AND CROSS BASE PARTIALLY COVERED BY CONCRETE CAP (OVER ORIGINAL GRANITE BASE UNIT).



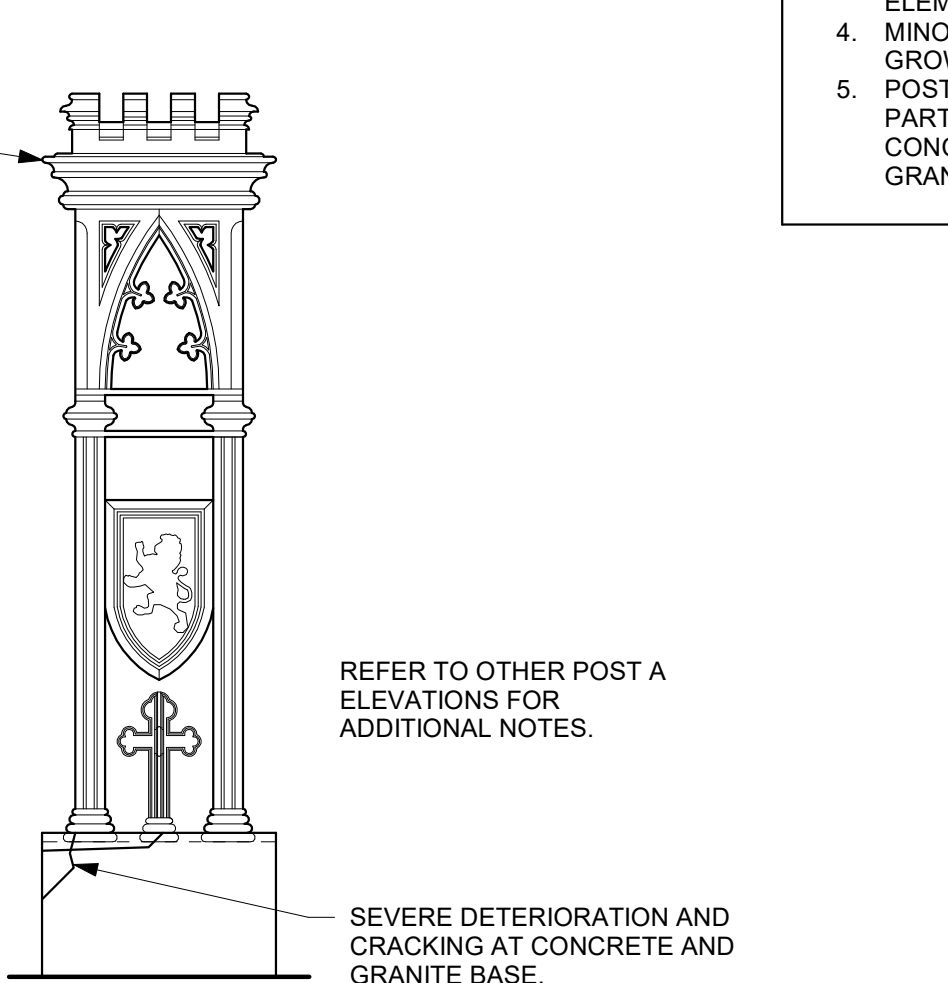
4 Post A - West Elevation
3/4" = 1'-0"



3 Post A - South Elevation
3/4" = 1'-0"



2 Post A - East Elevation
3/4" = 1'-0"



1 Post A - North Elevation
3/4" = 1'-0"



MOUNT AUBURN CEMETERY
A National Historic Landmark

Scots' Charitable Society

Lot Fence (No. 816)

580 Mt. Auburn St.

Cambridge, MA 02138

Mount Auburn Cemetery

EXISTING CONDITIONS ASSESSMENT

Date: 05/09/2022
Scale: As indicated
Drawn By: ERC
Reviewed By: RAF
Project No: 2021.52



33 Ardis Lane
Weston, VT 05161
802.343.7867 - www.Foster-architecture.com

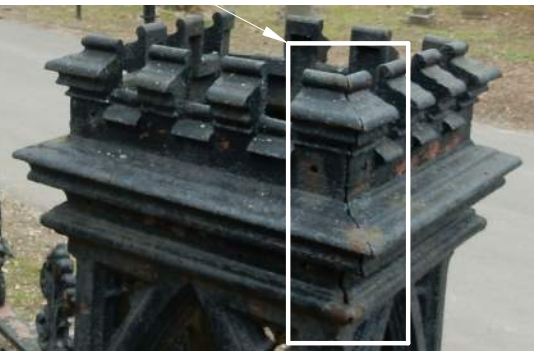
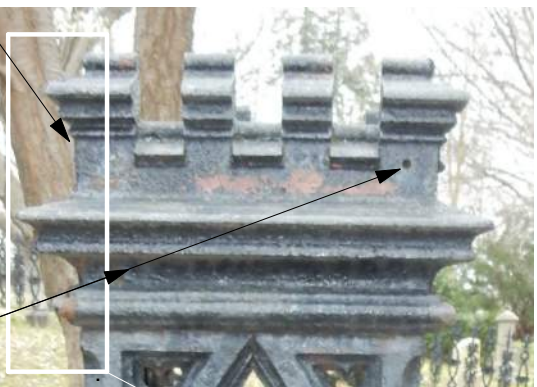
Post C and Post F Elevations

No.

A1.5

POST F GENERAL NOTES

1. CONCRETE / GRANITE BASE PARTIALLY COVERED BY GRADE.
2. SOME MISSING CAST IRON ELEMENTS.
3. SOME SEPARATION OF CAST IRON ELEMENTS.
4. MINOR RUST AND BIOLOGICAL GROWTH (MOSTLY AT INTERIOR).
5. POST BASES AND CROSS BASE PARTIALLY COVERED BY CONCRETE CAP (OVER ORIGINAL GRANITE BASE UNIT).
6. SOME CAST IRON ANCHOR PLUGS ARE MISSING.



SOME SEPARATION OF CAST IRON ELEMENTS.

MISSING CAST IRON ANCHOR PLUG.

TOP OF BASE PARTIALLY COVERED BY GRADE.

MISSING CAST IRON ANCHOR PLUGS.



MINOR RUST AT OUTER FACE OF CAST IRON.

POST BASES AND CROSS BASE PARTIALLY COVERED BY CONCRETE CAP (OVER ORIGINAL GRANITE BASE UNIT).

TOP OF BASE PARTIALLY COVERED BY GRADE.

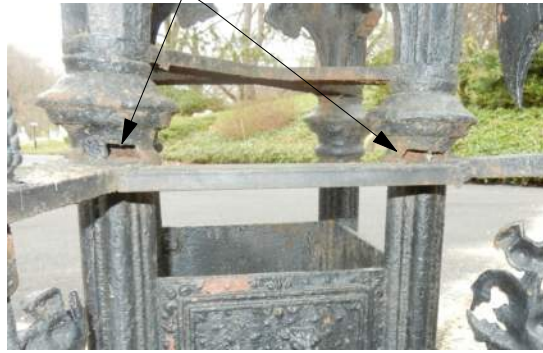


MISSING CAST IRON ANCHOR PLUGS.
RUST AND BIOLOGICAL GROWTH, TYP. (AT INTERIOR).

MISSING PROFILED CRENELLATION (AND BROKEN CAST IRON).



RUST AND DETERIORATION AT WELDED RAIL CONNECTION.



MISSING PROFILED CRENELLATION (AND BROKEN CAST IRON).

MISSING CAST IRON ANCHOR PLUGS.



8 Post F - West Elevation
3/4" = 1'-0"

7 Post F - South Elevation
3/4" = 1'-0"

6 Post F - East Elevation
3/4" = 1'-0"

5 Post F - North Elevation
3/4" = 1'-0"

POST C GENERAL NOTES

1. CRACKING AND DETERIORATION AT CONCRETE AND GRANITE BASE.
2. MISSING CRENELLATION.
3. SOME SEPARATION OF CAST IRON ELEMENTS.
4. SOME CAST IRON ELEMENTS SHIFTED OUT OF ALIGNMENT.
5. ALL CAST IRON UNITS AT CRENELLATED TOP ARE OUT OF ALIGNMENT.
6. MINOR RUST.
7. POST BASES AND CROSS BASE PARTIALLY COVERED BY CONCRETE CAP (OVER ORIGINAL GRANITE BASE UNIT).

SOME SEPARATION OF CAST IRON ELEMENTS AND ELEMENTS SHIFTED OUT OF ALIGNMENT.



SOME SEPARATION OF CAST IRON ELEMENTS AND ELEMENTS SHIFTED OUT OF ALIGNMENT.



MINOR RUST.

POST BASES AND CROSS BASE PARTIALLY COVERED BY CONCRETE CAP (OVER ORIGINAL GRANITE BASE UNIT).

LOSS OF MATERIAL / DETERIORATION AT CONCRETE BASE.



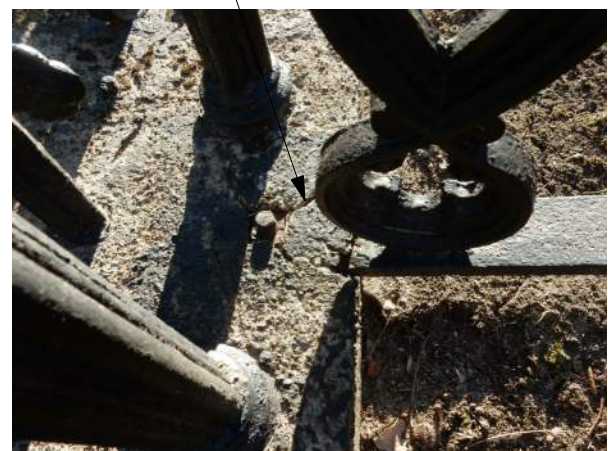
MISSING CRENELLATION.
MINOR RUST.



MISSING CAST IRON ANCHOR PLUG.

SOME SEPARATION OF CAST IRON ELEMENTS AND ELEMENTS SHIFTED OUT OF ALIGNMENT.

MINOR DETERIORATION AND CRACKING AT CONCRETE BASE.



4 Post C - West Elevation
3/4" = 1'-0"

3 Post C - South Elevation
3/4" = 1'-0"

2 Post C - East Elevation
3/4" = 1'-0"

1 Post C - North Elevation
3/4" = 1'-0"



RUST AT INTERIOR, TYP.



WEST ELEVATION
SHOWING CAST
IRON BAR.



NOTE: GATE 1 IS NOT
OPERABLE. NO EVIDENCE
OF HINGES OR LOCK
MECHANISM. GATE IS
SECURED FROM THE BACK
WITH A CAST IRON BAR
ANCHORED WITH BOLTS
AND WASHERS.

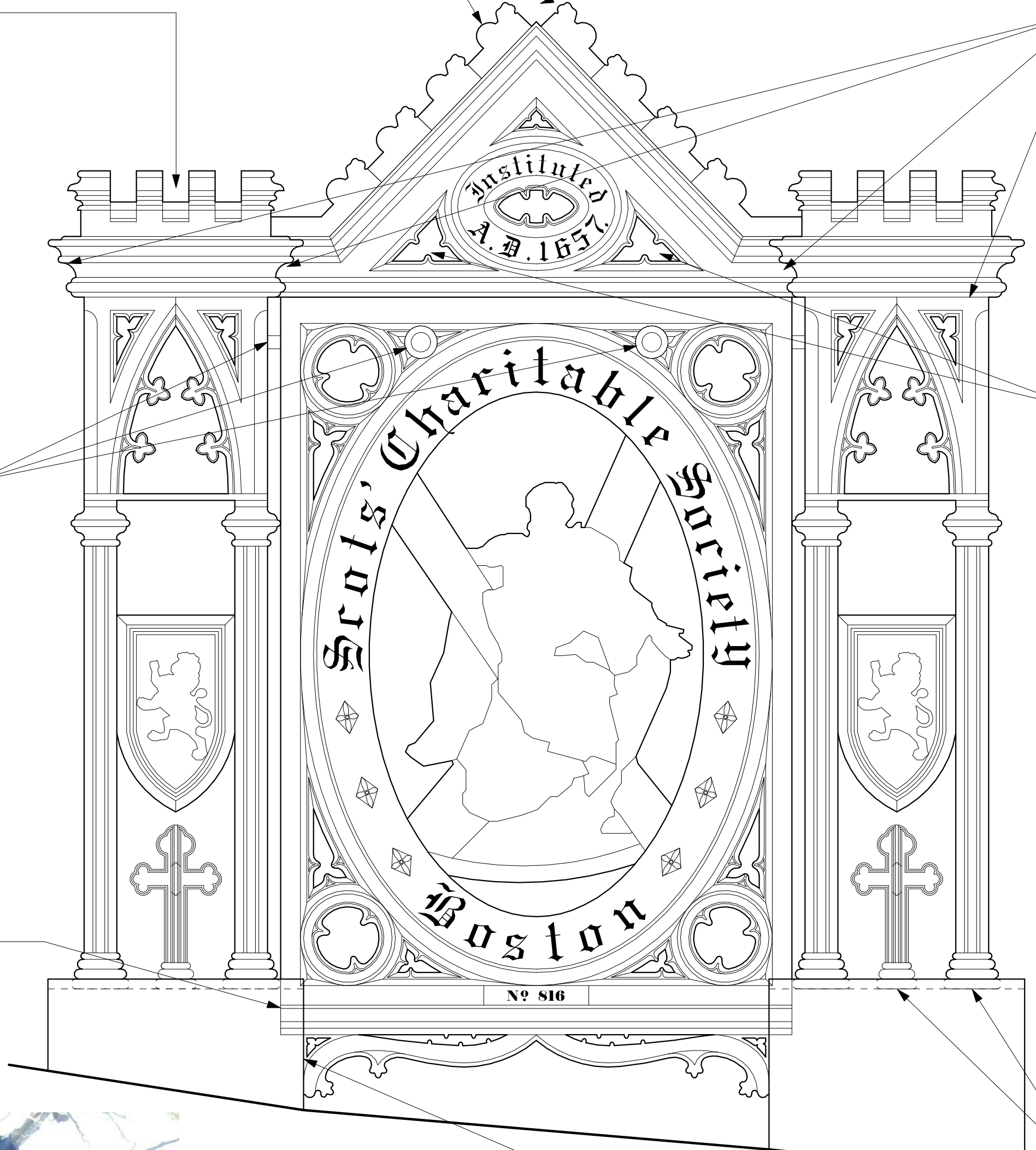


SOME RUST AT CAST IRON
DECORATIONS AND
LETTERING, TYP.



PART OF CAST IRON GATE IS
EMBEDDED IN THE ADDED
CONCRETE CAP (BOTH SIDES).

NOTE: WEST ELEVATION OF
GATE IS NOT PROFILED (BACK
OF CAST IRON MOLD).



CAST IRON PEDIMENT
DECORATIONS ARE LOOSE
AND OUT OF ALIGNMENT, TYP.
MISSING CAST IRON FINIAL.



SOME SEPARATION OF CAST
IRON ELEMENTS.



RUST AND DETERIORATION.



POST BASES AND CROSS BASES
PARTIALLY COVERED BY
CONCRETE CAP (OVER ORIGINAL
GRANITE BASE UNIT), TYP.



CRACKED CONCRETE
BASE (AT RETURN AND AT
TOP).



MOUNT AUBURN CEMETERY
A National Historic Landmark

Scots' Charitable Society
Lot Fence (No. 816)
580 Mt. Auburn St.
Cambridge, MA 02138
Mount Auburn Cemetery

EXISTING CONDITIONS ASSESSMENT

Date: 05/09/2022
Scale: 1 1/2" = 1'-0"
Drawn By: ERC
Reviewed By: RAF
Project No: 2021.52



33 Ardis Lane
Weston, VT 05161
802.343.7867 - www.Foster-architecture.com

Gate 1 - East
Elevation

No.

A1.6



MISSING PROFILED
CRENELLATION (AND
BROKEN CAST IRON.



AT SOUTH, EAST, AND
WEST POST ELEVATIONS:
CAST IRON ELEMENTS
SHIFTED OUT OF
ALIGNMENT.

AT EAST POST ELEVATION:
MISSING PROFILED
CRENELLATION (AND
BROKEN CAST IRON.

MAKER'S MARK

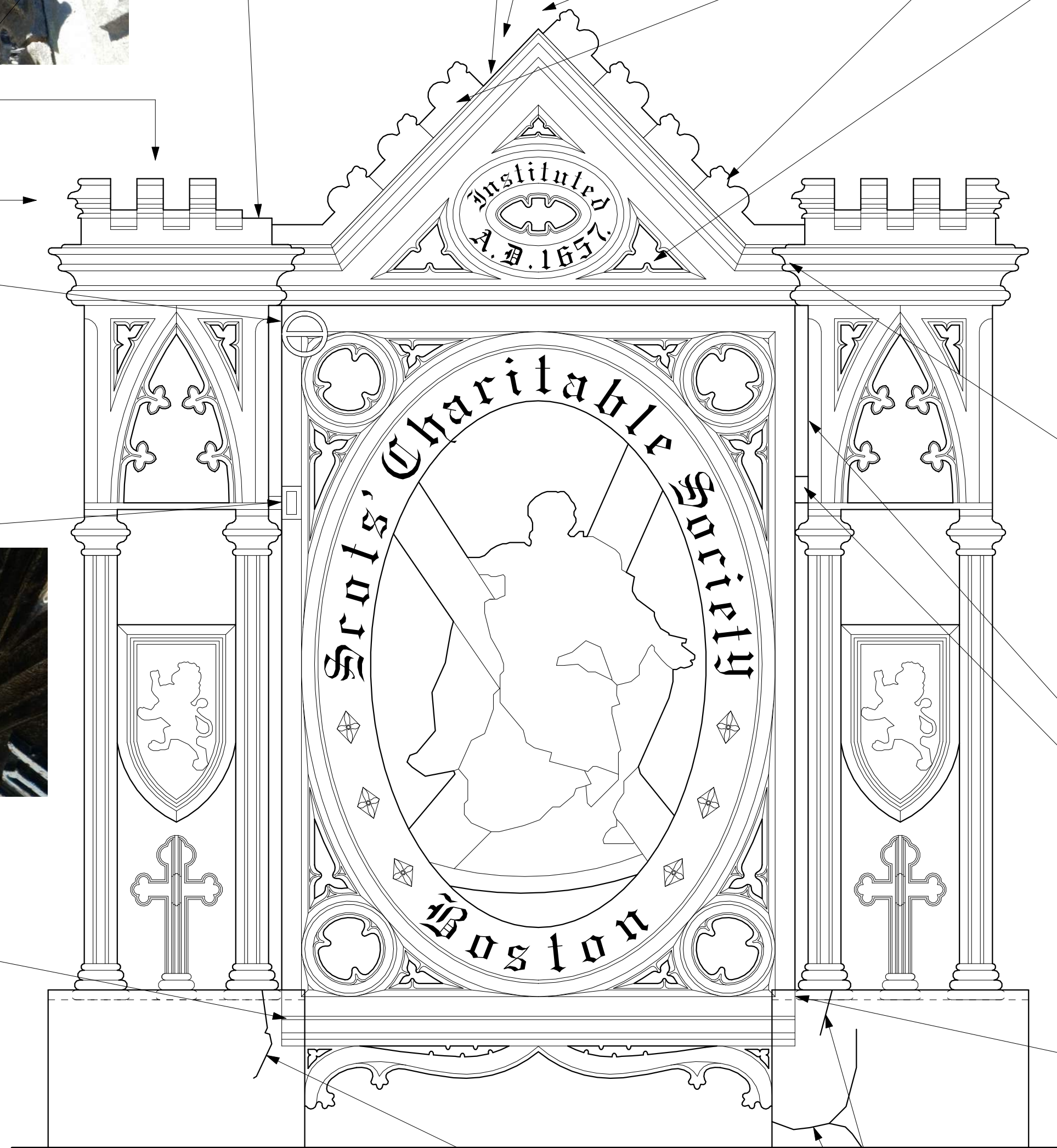


EXISTING GATE LATCH.



SOUTH ELEVATION OF
CONCRETE CAP IS NOTCHED
TO ALLOW GATE TO SWING.

NOTE: SOUTH ELEVATION OF
GATE IS NOT PROFILED (BACK
OF CAST IRON MOLD).



SOME SEPARATION OF
CAST IRON ELEMENTS.

MISSING CAST IRON
PEDIMENT DECORATION.

MISSING CAST IRON FINIAL.

CAST IRON PEDIMENT
DECORATIONS ARE LOOSE
AND OUT OF ALIGNMENT, TYP.

MINOR RUST, TYP.



SOME SEPARATION OF CAST
IRON ELEMENTS.



AT EAST POST ELEVATION:
RUST AND DETERIORATION.
VIEW OF TOP HINGE AT
SOUTH ELEVATION.



SOUTH ELEVATION OF
CONCRETE CAP IS NOTCHED
TO ACCOMMODATE THE
LOWER HINGE.



CRACKING AND
DETERIORATION AT
CONCRETE BASE, ALL
SIDES, TYP.



MOUNT AUBURN CEMETERY
A National Historic Landmark

Scots' Charitable Society
Lot Fence (No. 816)
580 Mt. Auburn St.
Cambridge, MA 02138
Mount Auburn Cemetery

EXISTING CONDITIONS ASSESSMENT

Date: 05/09/2022
Scale: 1 1/2" = 1'-0"
Drawn By: ERC
Reviewed By: RAF
Project No: 2021.52



33 Ardis Lane
Weston, VT 05161
802.343.7867 - www.Foster-architecture.com

Gate 2 - North
Elevation

No.

A1.7



MOUNT AUBURN CEMETERY
A National Historic Landmark

Scots' Charitable Society
Lot Fence (No. 816)
580 Mt. Auburn St.
Cambridge, MA 02138
Mount Auburn Cemetery

EXISTING
CONDITIONS
ASSESSMENT

Date: 05/09/2022
Scale: 1 1/2" = 1'-0"
Drawn By: FE / EC
Reviewed By: RAF
Project No: 2021.52

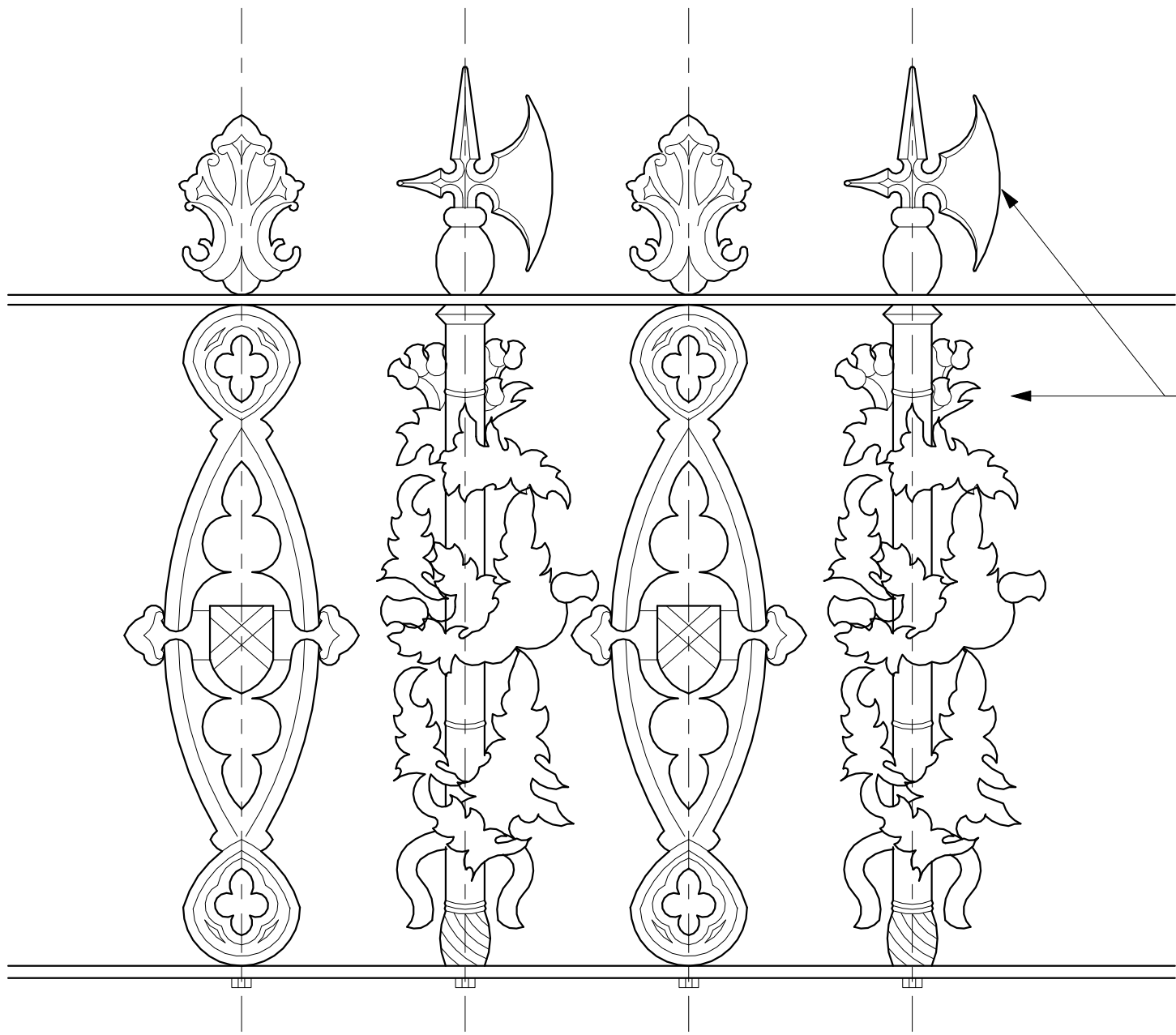


33 Ardis Lane
Weston, VT 05161
802.343.7867 - www.Foster-architecture.com

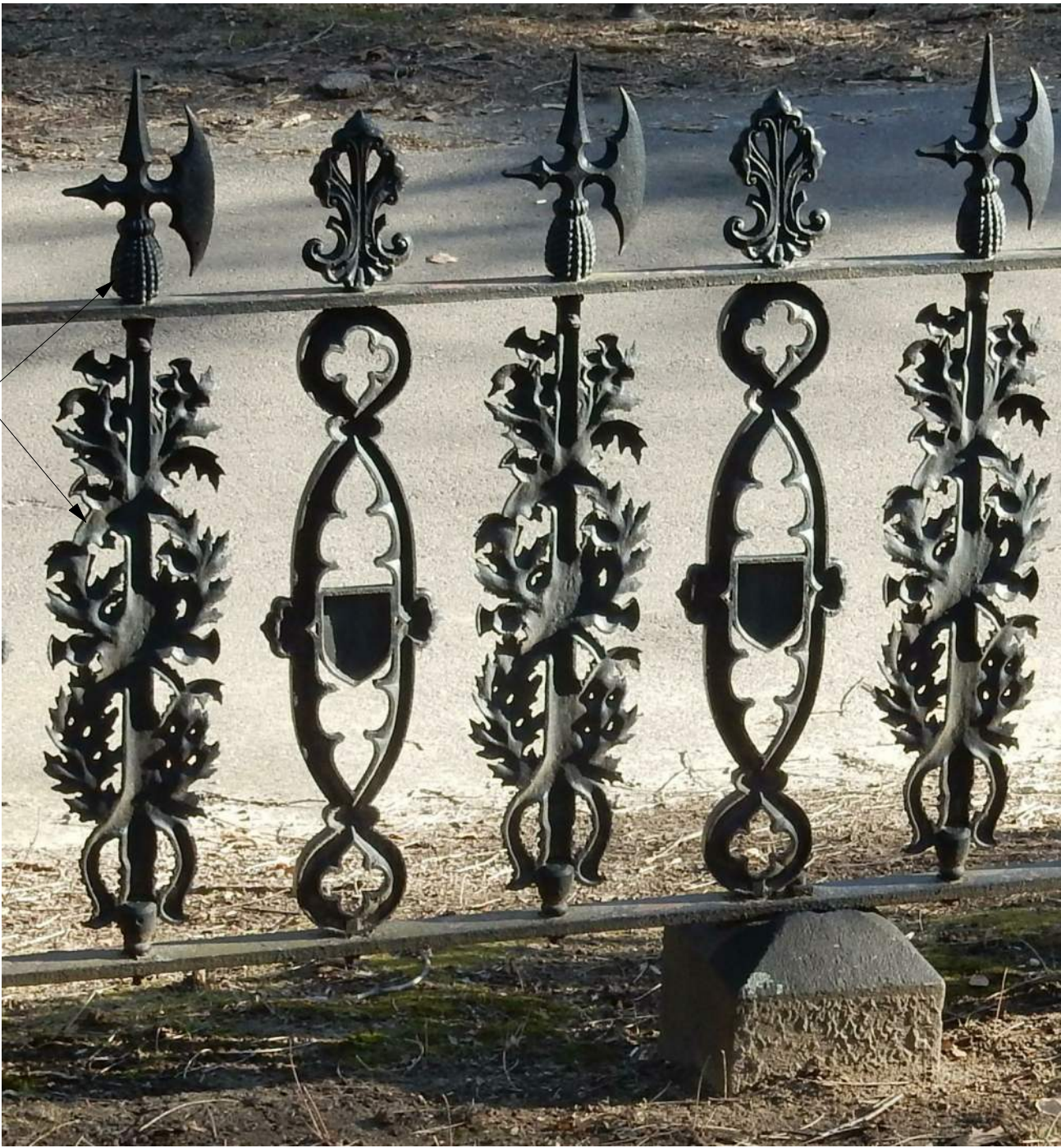
Partial Elevations

No.

A1.8



NOTE: BACKS OF ALL PICKETS
ARE NOT PROFILED (BACK OF
CAST IRON MOLD). TOP
DECORATIVE CAST IRON
ELEMENTS ARE PROFILED.



1 Partial Picket Elevation
1 1/2" = 1'-0"

CPA APPLICATION BUDGET

Scots' Charitable Society Lot Fence Restoration

▲ PROJECT NAME

Friends Of Mount Auburn Cemetery

▲ PROJECT APPLICANT

Project Budget Summary

TOTAL PROJECT COST	CPA FUNDS REQUESTED	OTHER FUNDING (NON-CPA FUNDS)	OTHER FUNDS % OF TOTAL PROJECT COST
\$ 782,700	\$ 300,000	\$ 482,700	% 62

Status of Non-CPA Funding

Please include documentation of funding with this application.

SOURCE	APPLICATION DATE	AMOUNT	TYPE (CASH, IN-KIND)	STATUS OF FUNDING				
				PROPOSAL TO BE SUBMITTED	PENDING	REQUEST DENIED	COMMITMENT RECEIVED	FUNDS ON HAND
Mount Auburn Budget	-	357,700	Cash					✓
Scots' Charitable Society	-	\$75,000	Cash				✓	
MPPF	-	\$50,000	Cash	✓				

Project Budget

Please include an itemized budget at a level of detail commensurate with the project complexity.

CATEGORY	ITEM	CPA FUNDS REQUESTED	OTHER FUNDS	HOW COST WAS ESTIMATED (E.G. PROFESSIONAL QUOTE)*	TOTAL
Professional Fees	27,700	0	27700	professional quote	27700
Construction	730,000	300000	430000	professional quote	730000
Equipment					
Labor	20000	0	20000	horticulture estimate	20000
Materials	5000	0	5000	horticulture estimate	5000
Supplies					
Other (explain)					

*Note: Please remember to review state procurement laws as applicable to your project.

Maintenance Budget

Year 1	Year 2	Year 3	Year 4	Year 5
\$ 750	\$ 750	\$ 750	\$ 750	\$ 750

Scots' Fence Bid Comparisons

Revised, PBS with Cassidy

9/11/2023

Cassidy bid numbers in blue.



MOUNT AUBURN CEMETERY
A National Historic Landmark

PBS / Cassidy

Div. 1 - Gen Req.	\$63,245
Div. 2 - Existing Conditions	\$7,800
Div. 4 - Masonry	\$83,165
Div. 5 - Metals	\$336,700
Div. 9 - Finishes	in Div. 5 above
Div. 32 - Site improvements	\$55,037

Subtotal **\$545,947**

Unit Prices	\$39,000	
A. (2) replacement cross bases	\$6,000	\$3000 per unit
B. (6) replacement post bases	\$15,000	\$2500 per unit
C. (4) replacement crenellations	\$18,000	\$4500 per unit
General Conditions	\$59,883	
Building Permit	\$0	excluded
General Liability Insurance	\$1,534	
OH&P	\$65,062	

Base Bid Total **\$711,426**

Alternates

1. picket and head replacement	\$18,300	
2. Quincy granite curbs	\$0	Quincy unavailable
3. screen-printed scrim	\$4,132	

Total for all Alternates **\$22,432**

Bid Total with Alt. 1 only	\$729,726
Bid Total with Alt. 3 only	\$715,558
Bid Total with Alt. 1 and Alt. 3	\$733,858

Scots' Charitable Society Lot Fence Restoration

Unit Prices:

See Specification Section 01 22 00 for Unit Prices. Unit price worksheet to be attached to this bid. All costs for unit prices shall be included in the Base Bid.

Alternate No. 1: picket and picket head replacement

1. Provide cost for mold of Picket Type 1 and provide cost for replacement of individual picket (to be prepped, primed, and painted). Provide cost for mold of Picket Type 2 and provide cost for replacement of individual picket (to be prepped, primed, and painted). Provide cost for mold of Picket Head Type 1 and provide cost for replacement of individual picket head (to be prepped, primed, and painted). Provide cost for mold of Picket Head Type 2 and provide cost for replacement of individual picket head (to be prepped, primed, and painted). (Refer to Detail 1/A4.1)

Dollars: Eighteen Thousand and Three Hundred \$ 18,300.00

Alternate No. 2: granite curbs

1. New granite curbs to be Quincy granite.

Dollars: N/A \$

Alternate No. 3: screen-printed construction fence scrim

1. Construction fence scrim to have full screen-printed images of Scots' Fence on the Fir Avenue elevation (North) and the Walnut Avenue elevation (East).

Dollars: N/A \$

(APPLY SEAL IF BID IS BY A CORPORATION)

END OF SECTION 00 41 00

Scots' Charitable Society Lot Fence Restoration

SECTION 00 41 00 - BID FORM

(Reproduce on Bidder's letterhead)

Date: July 28, 2023

To: Mount Auburn Cemetery
580 Mount Auburn Street
Cambridge, MA 02138-5517

Attn: Mr. August (Gus) Fraser
Vice President of Preservation and Facilities

Project: Scots' Charitable Society Lot Fence Restoration

We have examined the Contract Documents and the site for the referenced project. We are familiar with all of the requirements of the Documents, and existing conditions relative to the execution of this Work. We hereby propose to complete the Work in accordance with the Contract Documents for the Base-Bid Sum of:

Three Hundred and Thirty Six Thousand and Dollars \$ 336,700.00
(words) Seven hundred ⁰⁰ - 100 (figures)

Number of Calendar Days required to complete the project and the date of substantial completion:

PROPOSED TEAM

The Base Bid is predicated on the following individuals working on the project (attach resumes):

Role	Name	% Commitment
Project Executive:		
Project Manager:		
Assistant Project Manager(s):		
Superintendent(s):		
Assistant Superintendent(s):		
Project Safety Manager:		
QA/QC Manager:		

Scots' Charitable Society Lot Fence Restoration

G. This substitution will amount to a credit or extra cost to the Owner of: Scots' Plot
Six Thousand Dollars (\$ 6,000.00).

Notes: We will have it tested to see if lead is present.

Submission of this form by the Contractor will not require the Owner to accept the proposed substitution.

The Owner's acceptance of any substitution will not change the Contract Price, unless the Owner, Contractor and any other required parties execute a Change Order in accordance with the terms and provisions of the Contract Documents.

Refer to Section 01 33 00 – SUBMITTAL PROCEDURES, for additional requirements for the submittal and processing of substitution requests.

Submitted By: M. J. Cassidy
(signature)

Title: President

Firm: Cassidy Bros. Forge, Inc.

END OF SUBSTITUTION REQUEST FORM

Scots Fence Application with Attachments 53-4

SCOTS FENCE MT. AUBURN 8-11-23 PBS v2

[illegible]

Scots' Charitable Society Lot Fence Restoration

SECTION 01 33 01 – SUBSTITUTION REQUEST FORM

Project: Scots' Charitable Society Lot Fence Restoration

To: Foster Architecture

We hereby submit for your consideration the following product as a substitution for the item specified for the above referenced project:

Drawing Number: _____ Drawing Title: _____

Specification Section: _____ Section Title: _____

Paragraph: _____ Specified Item: _____

Proposed Substitution: Possible deduction for no lead on ironwork

Attach complete information on changes to Drawings and Specifications, including related work on other Drawings and under other Sections of the Specifications necessary for the proper installation of the proposed substitution, including proper coordination and finishing.

Submit with request complete Product Data, samples, and other data necessary to substantiate that the proposed item is equal to or exceeds the specified item in all respects. Include a comparison chart showing material features and properties of the specified item and the proposed substitute, paying particular attention to requirements specifically mentioned in the Specifications or shown on the Drawings, and guarantee/warranty information. Clearly mark manufacturer's literature to indicate equality in performance. In the case of operating equipment or systems, provide information as to servicing and maintenance requirements, and anticipated service life in the indicated application.

Fill in the blanks below (attach additional sheets as necessary):

A. Does the substitute affect dimensions shown on the Drawings: Yes ☐ No ☒
(if yes, clearly indicate changes on enclosures)

B. Will the undersigned pay for changes to the building design, including architectural / engineering detailing costs caused by the requested substitution: Yes ☐ No ☒
(if no, please explain)

C. What effect does the substitution have on other Contracts or other trades? none

D. What effect does the substitution have on the construction schedule? none

E. Manufacturer's warranties of the specified and proposed items are: Same ☐ Different ☐

Explain: _____

F. Itemized comparison of specified item with proposed substitute is attached.

Scots Fence Application with Attachments 53-6

SUBSTITUTION REQUEST FORM

013301-1

Scots' Charitable Society Lot Fence Restoration

SECTION 00 41 00 - BID FORM

(Reproduce on Bidder's letterhead)

Date: July 28th, 2023

To: Mount Auburn Cemetery
580 Mount Auburn Street
Cambridge, MA 02138-5517

Attn: Mr. August (Gus) Fraser
Vice President of Preservation and Facilities

Project: Scots' Charitable Society Lot Fence Restoration

We have examined the Contract Documents and the site for the referenced project. We are familiar with all of the requirements of the Documents, and existing conditions relative to the execution of this Work. We hereby propose to complete the Work in accordance with the Contract Documents for the Base-Bid Sum of:

Seven Hundred Seventy-Two Thousand Eight Hundred Sixty Dollars \$ 772,860
(words) (figures)

Number of Calendar Days required to complete the project and the date of substantial completion:

PROPOSED TEAM

The Base Bid is predicated on the following individuals working on the project (attach resumes):

Role	Name	% Commitment
Project Executive:	Paul Thibeault	100%
Project Manager:		
Assistant Project Manager(s):	Chris Hayes	25%
Superintendent(s):	To Be Determined	
Assistant Superintendent(s):		
Project Safety Manager:	Rob Lilley	As Required
QA/QC Manager:		

Scots' Charitable Society Lot Fence Restoration

SCHEDULE OF VALUES

Division 1: General Requirements	\$ <u>63,245</u>
Division 2: Existing Conditions	\$ <u>7,800</u>
Division 3: Concrete – Not used.	
Division 4: Masonry	\$ <u>83,165</u>
Division 5: Metals	\$ <u>414,174</u>
Division 6: Wood, Plastics, and Composites – Not used.	
Division 7: Thermal and Moisture Protection – Not used.	
Division 8: Openings – Not used.	
Division 9: Finishes	\$ <u>With Div 5</u>
Division 10: Specialties – Not used.	
Division 11: Equipment – Not used.	
Division 12: Furnishings – Not used.	
Division 13: Special Construction – Not used.	
Division 14: Conveying Systems – Not used.	
Division 21: Fire Suppression – Not used.	
Division 22: Plumbing – Not used.	
Division 23: HVAC – Not used.	
Division 26: Electrical – Not used.	
Division 27: Communications – Not used.	
Division 31: Earthwork – Not used.	
Division 32: Site Improvements	\$ <u>0</u>
Division 33: Utilities – Not used.	
Subtotal Lump Sum:	\$ <u>568,385</u>
Unit Price Total (From Unit Price Worksheet Section 01 22 00)	\$ <u>37,805</u>
General Conditions	\$ <u>58,984</u>
Building Permit	\$ <u>12,720</u>
General Liability Insurance	\$ <u>1,314</u>
Overhead and Profit	\$ <u>93,653</u>
Total Lump Sum:	\$ <u>772,860</u>
GC Fee for additional work:	<u>15</u> %

See next page for more information on Unit Prices and Alternates.

Scots' Charitable Society Lot Fence Restoration

Unit Prices:

See Specification Section 01 22 00 for Unit Prices. Unit price worksheet to be attached to this bid. All costs for unit prices shall be included in the Base Bid.

Alternate No. 1: picket and picket head replacement

1. Provide cost for mold of Picket Type 1 and provide cost for replacement of individual picket (to be prepped, primed, and painted). Provide cost for mold of Picket Type 2 and provide cost for replacement of individual picket (to be prepped, primed, and painted). Provide cost for mold of Picket Head Type 1 and provide cost for replacement of individual picket head (to be prepped, primed, and painted). Provide cost for mold of Picket Head Type 2 and provide cost for replacement of individual picket head (to be prepped, primed, and painted). (Refer to Detail 1/A4.1)

Dollars: Forty-Two Thousand Seven Hundred Fifty \$ 42,750

Alternate No. 2: granite curbs

1. New granite curbs to be Quincy granite.

Dollars: Sixty-Three Thousand Two Hundred Ninety-Three \$ 63,293

Alternate No. 3: screen-printed construction fence scrim

1. Construction fence scrim to have full screen-printed images of Scots' Fence on the Fir Avenue elevation (North) and the Walnut Avenue elevation (East).

Dollars: Four Thousand One Hundred Thirty-Two \$ 4,132

(APPLY SEAL IF BID IS BY A CORPORATION)

END OF SECTION 00 41 00

Scots' Charitable Society Lot Fence Restoration

SECTION 01 22 00 – UNIT PRICES

PART 1 - GENERAL

1.01 RELATED DOCUMENTS

- A. The drawings and general provisions of the Contract, including General and Supplementary Conditions, Division 1 Specification Sections, and relevant sections of these Specifications, apply to the work specified in this Section.

1.02 DEFINITION OF UNIT PRICE

- A. Unit prices shall include material, labor, overhead, profit and all other related expenses. Unit measure shall include only work incorporated into the project. All associated work shall be included in unit prices. All unit work is in addition to specific work shown on drawings.
- B. Contract Sum shall include the General Contractor's unit price times the stated number of units. Whenever units actually used are more than or less than that stated, the Contract Sum shall be adjusted accordingly by Change Order.
1. If any/all of the unit price work is not undertaken as part of the contract, the Owner shall be entitled to a credit of 90% of the unexpended unit price balance when all unit price work has been totaled.
- C. Contractor shall not proceed with any unit price work without review and approval of the work by the Architect and Boston College Project Manager.

1.3 UNIT PRICES IN EFFECT

- A. *Provide and install two (2) replacement cast iron cross bases. Bases to be prepped, primed, and painted. (Refer to Details 6 and 7 on Sheet A4.2.)*
- (2) cross bases @ \$ 3,678 / base = \$ 7,356
- B. *Provide and install six (6) replacement cast iron post bases. Bases to be prepped, primed, and painted. (Refer to Details 6 and 7 on Sheet A4.2.)*
- (6) post bases @ \$ 3,191 / base = \$ 19,146
- C. *Provide and install four (4) replacement cast iron crenellations. Crenellations to be prepped, primed, and painted. (Refer to Details 1 and 2 on Sheet A4.2.)*
- (4) crenellations @ \$ 2,826 / crenellation = \$ 11,304

Subtotal Unit Price Work \$ _____

END OF SECTION 01 22 00

INTERNAL REVENUE SERVICE
DISTRICT DIRECTOR
-G.P.O. BOX 1680
BROOKLYN, NY 11202

DEPARTMENT OF THE TREASURY

Date: JAN 30 1991

FRIENDS OF MOUNT AUBURN CEMETERY
580 MOUNT AUBURN STREET
CAMBRIDGE, MA 02138

Employer Identification Number:
22-3084639
Contact Person:
NANCY KENNY
Contact Telephone Number:
(718) 780-6114

Accounting Period Endings:
December 31
Foundation Status Classification:
509(a)(1)
Advance Ruling Period Begins:
11/20/90
Advance Ruling Period Ends:
12/31/94
Addendum Applies:
NO

Dear Applicant:

Based on information supplied, and assuming your operations will be as stated in your application for recognition of exemption, we have determined you are exempt from Federal income tax under section 501(a) of the Internal Revenue Code as an organization described in section 501(c)(3).

Because you are a newly created organization, we are not now making a final determination of your foundation status under section 509(a) of the Code. However, we have determined that you can reasonably be expected to be a publicly supported organization described in sections 509(a)(1) and 170(b)(1)(A)(vi).

Accordingly, you will be treated as a publicly supported organization, and not as a private foundation, during an advance ruling period. This advance ruling period begins and ends on the dates shown above.

Within 90 days after the end of your advance ruling period, you must submit to us information needed to determine whether you have met the requirements of the applicable support test during the advance ruling period. If you establish that you have been a publicly supported organization, you will be classified as a section 509(a)(1) or 509(a)(2) organization as long as you continue to meet the requirements of the applicable support test. If you do not meet the public support requirements during the advance ruling period, you will be classified as a private foundation for future periods. Also, if you are classified as a private foundation, you will be treated as a private foundation from the date of your inception for purposes of sections 507(d) and 4940.

Grantors and contributors may rely on the determination that you are not a private foundation until 90 days after the end of your advance ruling period. If you submit the required information within the 90 days, grantors and contributors may continue to rely on the advance determination until the Service makes a final determination of your foundation status.

Letter 1045 (PO/CG)

UNITED STATES DEPARTMENT OF THE INTERIOR
NATIONAL PARK SERVICE

DATA SHEET

**NATIONAL REGISTER OF HISTORIC PLACES
INVENTORY -- NOMINATION FORM**

FOR NPS USE ONLY

RECEIVED APR 1 1975

DATE ENTERED APR 21 1975

SEE INSTRUCTIONS IN *HOW TO COMPLETE NATIONAL REGISTER FORMS*
TYPE ALL ENTRIES -- COMPLETE APPLICABLE SECTIONS

1 NAME

HISTORIC Mount Auburn Cemetery

AND/OR COMMON

Same

2 LOCATION

STREET & NUMBER

580 Mount Auburn Street

CITY, TOWN

Cambridge

VICINITY OF

NOT FOR PUBLICATION

CONGRESSIONAL DISTRICT

Eighth Mass.

STATE

Massachusetts

CODE

25

COUNTY

Middlesex

CODE

017

3 CLASSIFICATION**CATEGORY**☒ DISTRICT☐ BUILDING(S)☐ STRUCTURE☐ SITE☐ OBJECT**OWNERSHIP**☐ PUBLIC☒ PRIVATE☐ BOTH**PUBLIC ACQUISITION**☐ IN PROCESS☐ BEING CONSIDERED**STATUS**☒ OCCUPIED☐ UNOCCUPIED☐ WORK IN PROGRESS**ACCESSIBLE**☒ YES: RESTRICTED☐ YES: UNRESTRICTED☐ NO**PRESENT USE**☐ AGRICULTURE☐ MUSEUM☐ COMMERCIAL☒ PARK☐ EDUCATIONAL☐ PRIVATE RESIDENCE☐ ENTERTAINMENT☐ RELIGIOUS☐ GOVERNMENT☐ SCIENTIFIC☐ INDUSTRIAL☐ TRANSPORTATION☐ MILITARY☒ OTHER: Cemetery**4 OWNER OF PROPERTY**

NAME Proprietors of the Cemetery of Mount Auburn

STREET & NUMBER

580 Mount Auburn Street

CITY, TOWN

Cambridge

VICINITY OF

STATE

Massachusetts

5 LOCATION OF LEGAL DESCRIPTION

COURTHOUSE,

REGISTRY OF DEEDS, ETC.

Middlesex County Registry of Deeds

STREET & NUMBER

Cambridge at Third Street

CITY, TOWN

Cambridge

STATE

Massachusetts

6 REPRESENTATION IN EXISTING SURVEYS

TITLE

Survey of Architectural History of Cambridge

DATE

1971

☐ FEDERAL ☐ STATE ☐ COUNTY ☒ LOCALDEPOSITORY FOR
SURVEY RECORDS

Cambridge Historical Commission

CITY, TOWN

Cambridge

STATE

Massachusetts

Scots Fence Application with Attachments

7 DESCRIPTION

CONDITION

☒ EXCELLENT

☐ GOOD

☐ FAIR

☐ DETERIORATED

☐ RUINS

☐ UNEXPOSED

CHECK ONE

☒ UNALTERED

☐ ALTERED

CHECK ONE

☒ ORIGINAL SITE

☐ MOVED

DATE _____

DESCRIBE THE PRESENT AND ORIGINAL (IF KNOWN) PHYSICAL APPEARANCE

Mount Auburn is a privately-owned cemetery of 170 acres located near the Charles River on the Cambridge-Watertown line. Only 15 acres are within the Cambridge city limits. It forms the major portion of a group of contiguous cemeteries, with the Cambridge City Cemetery to the south and the Roman Catholic Cemetery to the west. Most of the grounds are surrounded by a cast iron fence of which the portion along Mt. Auburn Street dates from 1844. The main entrance is on Mt. Auburn Street, Cambridge.

The site is part of a glacial moraine that includes several ponds and knolls, as well as a 136-foot hill known as "Mount Auburn," which has a panoramic view of Boston. The initial section of Mount Auburn Cemetery consisted of 72 acres that were part of Stone's Woods, a 17th century farmstead. This rural site was purchased for a garden cemetery project by the Massachusetts Horticultural Society and laid out by Alexander Wadsworth in 1831-32. Wadsworth's plan was for curvilinear roads and intersecting footpaths along a broad axis extending from the Mount Auburn Street gate to "Mount Auburn" itself. The burial lots were scattered along the access routes. The asymmetrical pattern formed by the plan was an abrupt departure from the narrow, rigid rows of burial plots characteristic of central city churchyards of the period. Although modelled in concept on the landscaped grounds of Pere La Chaise, a Parisian cemetery-park, Mount Auburn was laid out according to English landscape design principles, with the circulation system adapted to the natural topography and scenic potential of the site.

The road pattern of Mount Auburn's first plan remains virtually intact. Its winding roads and paths were repeated in subsequent additions to the cemetery until the 1870's, when the "landscaped lawn" concept was introduced in the outlying sections of the ground. Under this plan the paths were omitted and enclosure of lots prohibited, forming a broad sweep of cut grass relieved by tree and shrub planting.

The original Mount Auburn site was heavily wooded and one of the area's chief attractions was its wild, picturesque landscape and rural appearance. The heavy growth of trees was thinned out beginning in 1835 and by the Civil War, demands for more burial space and less expensive maintenance led to the cropping of hills, swamp drainage, land fill, and extensive tree removal and replanting projects. The natural topography of the site was gradually altered throughout the 19th century and exotic trees and plants were introduced, creating a man-made landscaped garden. Over 200 species of deciduous trees, and 65 of evergreens, now exist in the cemetery, which is an important bird sanctuary. Dell, Central and Mountain Avenues best retain the character of the original setting.

The grave markers of the cemetery's early years were scattered in wooded sites, but over time the area grounds have filled up and now contain monuments for over 70,000 interments. The early monuments were fashioned of white marble. Brownstone was introduced in the mid-Victorian period, and

UNITED STATES DEPARTMENT OF THE INTERIOR
NATIONAL PARK SERVICE

**NATIONAL REGISTER OF HISTORIC PLACES
INVENTORY -- NOMINATION FORM**

FOR NPS USE ONLY

RECEIVED APR 1 1975

DATE ENTERED APR 21 1975

CONTINUATION SHEET

ITEM NUMBER 7 PAGE 1

7. DESCRIPTION

granite and other durable stone predominated in the latter part of the 19th century. In style the tombs, obelisks, sarcophagi, and headstones reflect architectural and decorative motifs characteristic of periods ranging from the Roman and Greek Classical through the Colonial Revival and modern periods. Some of the white marble structures and elaborate cast iron lot enclosures are badly deteriorated from the effects of weather and time, although most markers are in excellent condition.

Buildings within the Mount Auburn grounds remain in substantially original condition. The famous Egyptian Revival gate on Mt. Auburn Street, a free interpretation of the temples at Dendorah and Thebes, was built first in wood and duplicated in granite in 1843. The gateway design was adapted from a model developed by Dr. Jacob Bigelow, a prime mover behind the founding of Mount Auburn.

Two other buildings projected in the original scheme follow the Romantic Picturesque style of architecture envisioned for the cemetery grounds. Bigelow Chapel, a simple granite structure surrounded by a row of octagonal pinnacles, was designed by Bigelow in an early Gothic Revival style. It was first erected in 1843 and rebuilt to the same design in 1858 when the first chapel showed signs of structural weakness.

Also in the Romantic tradition is the 62-foot tower on "Mount Auburn," designed under Bigelow's direction by Gridley J. F. Bryant, a prominent Boston architect. Built of large granite blocks and decorated with two battlemented galleries and a series of lancet windows, the circular tower was completed in 1853.

Story Chapel (1897) was designed by Willard T. Sears and built of Potsdam brownstone. The complex has a large square tower, a porte-cochere, and includes the cemetery's administrative offices. The building is of a more academic version of the English Gothic style employed in the Bigelow chapel.

A small rest house built shortly after the turn of this century is located at the South Gate. This building is in a freely adapted medieval style and has elaborate carved bargeboards and half-timber work.

8 SIGNIFICANCE

PERIOD		AREAS OF SIGNIFICANCE -- CHECK AND JUSTIFY BELOW			
☐ PREHISTORIC	☐ ARCHEOLOGY-PREHISTORIC	☐ COMMUNITY PLANNING	☒ LANDSCAPE ARCHITECTURE	☐ RELIGION	
☐ 1400-1499	☐ ARCHEOLOGY-HISTORIC	☐ CONSERVATION	☐ LAW	☐ SCIENCE	
☐ 1500-1599	☐ AGRICULTURE	☐ ECONOMICS	☐ LITERATURE	☐ SCULPTURE	
☐ 1600-1699	☒ ARCHITECTURE	☐ EDUCATION	☐ MILITARY	☐ SOCIAL/HUMANITARIAN	
☐ 1700-1799	☐ ART	☐ ENGINEERING	☐ MUSIC	☐ THEATER	
☒ 1800-1899	☐ COMMERCE	☐ EXPLORATION/SETTLEMENT	☐ PHILOSOPHY	☐ TRANSPORTATION	
☒ 1900-	☐ COMMUNICATIONS	☐ INDUSTRY	☐ POLITICS/GOVERNMENT	☐ OTHER (SPECIFY)	
		☐ INVENTION			

SPECIFIC DATES 1831 BUILDER/ARCHITECT Alexander Wadsworth, Landscape Architect

STATEMENT OF SIGNIFICANCE

Mount Auburn is America's first rural garden cemetery and remains among the best preserved examples of its type. In both design and concept it set the fashion for numerous suburban burial grounds throughout the East and Middle West that were laid out until the latter part of the 19th century. The most famous of these are Mount Auburn's immediate successors, Laurel Hill in Philadelphia (1836), Greenwood in Brooklyn (1838), and Forest Hills in Roxbury (1848).

Mount Auburn exerted an influence on American landscape design that extended well beyond its leadership in establishing a new type of burial ground. It was Boston's first suburban park, and although conceived and carried out under private auspices, the cemetery's informal, asymmetrical plan and scenic grounds formed the basis for later, public projects like Central Park in New York City and Franklin Park in Boston. The popularity of Mount Auburn and its imitators influenced Andrew Jackson Downing, Frederick Law Olmsted, and prominent citizens and government officials of many large and crowded 19th century industrial cities.

The founding of the cemetery grew out of the convergence of two currents at work during the early decades of the 19th century, a growing American interest in horticulture and botany, and the development of public-spirited schemes by private citizens in the country's urban centers. The idea for a rural garden cemetery that would function as a public park and incorporate the latest theories in landscape design and horticultural practice was first promoted among influential Bostonians by Dr. Jacob Bigelow, a prominent physician, botanist and author. His plans were first realized with the founding of the Massachusetts Horticultural Society in 1829, the first such group in the country. Among the members of the Society's Garden and Cemetery Committee were Judge John Story, General H. A. S. Dearborn, and important business and political figures like John Lowell, Samuel Appleton, Edward Everett, and Samuel Gardner.

This Committee was organized for the purpose of establishing a model cemetery on the outskirts of Boston. In 1831 the group purchased 72 acres from George W. Brimmer for this purpose, employing Alexander Wadsworth to survey the tract for location of carriage avenues and footpaths. Wadsworth later designed several similar garden cemeteries and suburban developments in the Boston area, employing the informal, natural road configurations developed in the Mount Auburn plan.

9 MAJOR BIBLIOGRAPHICAL REFERENCES

Bigelow, Jacob. A History of the Cemetery of Mount Auburn.
Boston and Cambridge: James Monroe and Co., 1860.

Cambridge Historical Commission, Survey of Architectural History in
Cambridge, Volume 4: Old Cambridge. Cambridge: MIT Press,
pp. 69-72.

10 GEOGRAPHICAL DATA

ACREAGE OF NOMINATED PROPERTY 170

UTM REFERENCES

NWA 1,9 322870 4693500
ZONE EASTING NORTHING
SEC 1,9 323760 4692350

B 1,9 323770 4693480
ZONE EASTING NORTHING
SWD 1,9 322860 4692380

VERBAL BOUNDARY DESCRIPTION

Mount Auburn Street on the north; Coolidge Avenue on the east
and south; Grove Street and Roman Catholic Cemetery on the west.

LIST ALL STATES AND COUNTIES FOR PROPERTIES OVERLAPPING STATE OR COUNTY BOUNDARIES

STATE	CODE	COUNTY	CODE
STATE	CODE	COUNTY	CODE

11 FORM PREPARED BY

NAME / TITLE

Patricia Weslowski, Survey Director and Kathlyn Hatch, Cambridge Historical Commission

ORGANIZATION

Massachusetts Historical Commission

DATE

February 17, 1975

STREET & NUMBER

40 Beacon Street

TELEPHONE

(617) 727-8470

CITY OR TOWN

Boston

STATE

Massachusetts

12 STATE HISTORIC PRESERVATION OFFICER CERTIFICATION

THE EVALUATED SIGNIFICANCE OF THIS PROPERTY WITHIN THE STATE IS:

NATIONAL ☒

STATE ☐

LOCAL ☐

As the designated State Historic Preservation Officer for the National Historic Preservation Act of 1966 (Public Law 89-665), I hereby nominate this property for inclusion in the National Register and certify that it has been evaluated according to the criteria and procedures set forth by the National Park Service.

FEDERAL REPRESENTATIVE SIGNATURE

Elizabeth R. Amador

TITLE Mass. State Historic Preservation Officer

DATE March 21, 1975

FOR NPS USE ONLY

I HEREBY CERTIFY THAT THIS PROPERTY IS INCLUDED IN THE NATIONAL REGISTER

A. R. Mortenson

DATE

4/21/75

DIRECTOR, OFFICE OF ARCHEOLOGY AND HISTORIC PRESERVATION

ATTEST:

Charles A. Stenroos

DATE

4.17.75

KEEPER OF THE NATIONAL REGISTER

C. Stenroos

UNITED STATES DEPARTMENT OF THE INTERIOR
NATIONAL PARK SERVICE

FOR NPS USE ONLY

RECEIVED APR 1 1975

DATE ENTERED

APR 21 1975

**NATIONAL REGISTER OF HISTORIC PLACES
INVENTORY -- NOMINATION FORM**

CONTINUATION SHEET

ITEM NUMBER 8

PAGE 2

8. SIGNIFICANCE

The numerous monuments were designed by artists, architects, local stonecutters, and members of the families of the deceased. They reflect a wide range of 19th century architectural and decorative styles. Among the many important grave markers are the Greek Revival temple tomb of Samuel Appleton, the figure sculpture of the Magoun monument of the 1840s, the portrait sculpture of the Binney monument, and the Bulfinch monument, which incorporates an urn from the architect's Tontine Crescent of 1793-95. The sculpture was especially important in that it provided a forum for that art form in an era when the public had little access to original sculpture by American artists.

Among the nationally renowned Bostonians buried at Mount Auburn are Louis Agassiz, Philips Brooks, Charles Bulfinch, Dorothea Dix, Mary Baker Eddy, Asa Gray, Horatio Greenough, Oliver Wendell Holmes, Winslow Homer, Julia Ward Howe, Henry Wadsworth Longfellow, Amy Lowell, James Russell Lowell, and Charles Sumner.

UNITED STATES DEPARTMENT OF THE INTERIOR
NATIONAL PARK SERVICE

**NATIONAL REGISTER OF HISTORIC PLACES
INVENTORY -- NOMINATION FORM**

FOR NPS USE ONLY

RECEIVED APR 1 1975

DATE ENTERED APR 21 1975

CONTINUATION SHEET

ITEM NUMBER 9

PAGE 3

9. MAJOR BIBLIOGRAPHICAL REFERENCES

Dearborn, Nathaniel. Guide Through Mount Auburn. Boston, 1851.

Monroe, J. A Stranger's Guide Book to Mount Auburn Cemetery.
Boston, 1849.

Picturesque Pocket Companion and Visitor's Guide Through Mount Auburn.
Boston: Otis, Broaders & Company, 1839.

Stevens, L. M. Handbook for Passengers over the Cambridge Railroad
With a Description of Mount Auburn. Boston, 1858.

Story, Joseph. "An Address at the Dedication of Mount Auburn
Cemetery, September 24, 1831." Appendix with historical notice,
description, and a list of subscribers. Boston, 1831.

Trustees of Mount Auburn Cemetery. Annual Reports of the Trustees,
Together with Reports of the Treasurer and Superintendent.
Boston, 189-.

Walter, Cornelia W. with James Smillie, ill. Rural Cemeteries of
America: Mount Auburn. New York, 1850.



Bigelow Chapel, Mt. Auburn Cemetery, 1858

Form No. 10-301a
(Rev. 10-73)

UNITED STATES DEPARTMENT OF THE INTERIOR
NATIONAL PARK SERVICE

NATIONAL REGISTER OF HISTORIC PLACES
PROPERTY PHOTOGRAPH FORM

FOR NPS USE ONLY

RECEIVED APR 1 1975

DATE ENTERED APR 21 1975

SEE INSTRUCTIONS IN *HOW TO COMPLETE NATIONAL REGISTER FORMS*
TYPE ALL ENTRIES ENCLOSE WITH PHOTOGRAPH

1 NAME

HISTORIC

Mount Auburn Cemetery

AND/OR COMMON

same

2 LOCATION

CITY, TOWN

Cambridge

____ VICINITY OF

COUNTY

Middlesex

STATE

MA

3 PHOTO REFERENCE

PHOTO CREDIT

Richard Creek

DATE OF PHOTO 1975

NEGATIVE FILED AT Cambridge Historical Commission

4 IDENTIFICATION

DESCRIBE VIEW, DIRECTION, ETC. IF DISTRICT, GIVE BUILDING NAME & STREET

PHOTO NO.

2

stereopticon view of Bigelow Chapel, looking southwest

1084

PROPERTY OF THE NATIONAL REGISTER

70

Scots Fence Application with Attachments



UNITED STATES DEPARTMENT OF THE INTERIOR
NATIONAL PARK SERVICE

**NATIONAL REGISTER OF HISTORIC PLACES
PROPERTY PHOTOGRAPH FORM**

FOR NPS USE ONLY

RECEIVED APR 1 1975

DATE ENTERED APR 21 1975

SEE INSTRUCTIONS IN *HOW TO COMPLETE NATIONAL REGISTER FORMS*
TYPE ALL ENTRIES ENCLOSE WITH PHOTOGRAPH

1 NAME

HISTORIC Mount Auburn Cemetery

AND/OR COMMON Same

2 LOCATION

CITY, TOWN Cambridge VICINITY OF COUNTY Middlesex STATE Massachusetts

3 PHOTO REFERENCE

PHOTO CREDIT Richard Cheek DATE OF PHOTO 1969

NEGATIVE FILED AT Cambridge Historical Commission, 57 Inman St., Cambridge, MA.

4 IDENTIFICATION

DESCRIBE VIEW, DIRECTION, ETC. IF DISTRICT, GIVE BUILDING NAME & STREET

PHOTO NO. 1

North Perspective of Entrance Gate, 580 Mount Auburn Street

204

PROPERTY OF THE NATIONAL REGISTER



UNITED STATES DEPARTMENT OF THE INTERIOR
NATIONAL PARK SERVICE

NATIONAL REGISTER OF HISTORIC PLACES
PROPERTY PHOTOGRAPH FORM

FOR NPS USE ONLY

RECEIVED APR 1 1975

DATE ENTERED APR 21 1975

SEE INSTRUCTIONS IN *HOW TO COMPLETE NATIONAL REGISTER FORMS*
TYPE ALL ENTRIES ENCLOSE WITH PHOTOGRAPH

1 NAME

HISTORIC Mount Auburn Cemetery

AND/OR COMMON
same

2 LOCATION

CITY, TOWN Cambridge VICINITY OF COUNTY Middlesex STATE MA

3 PHOTO REFERENCE

PHOTO CREDIT Richard Cheek DATE OF PHOTO 1975

NEGATIVE FILED AT Cambridge Historical Commission

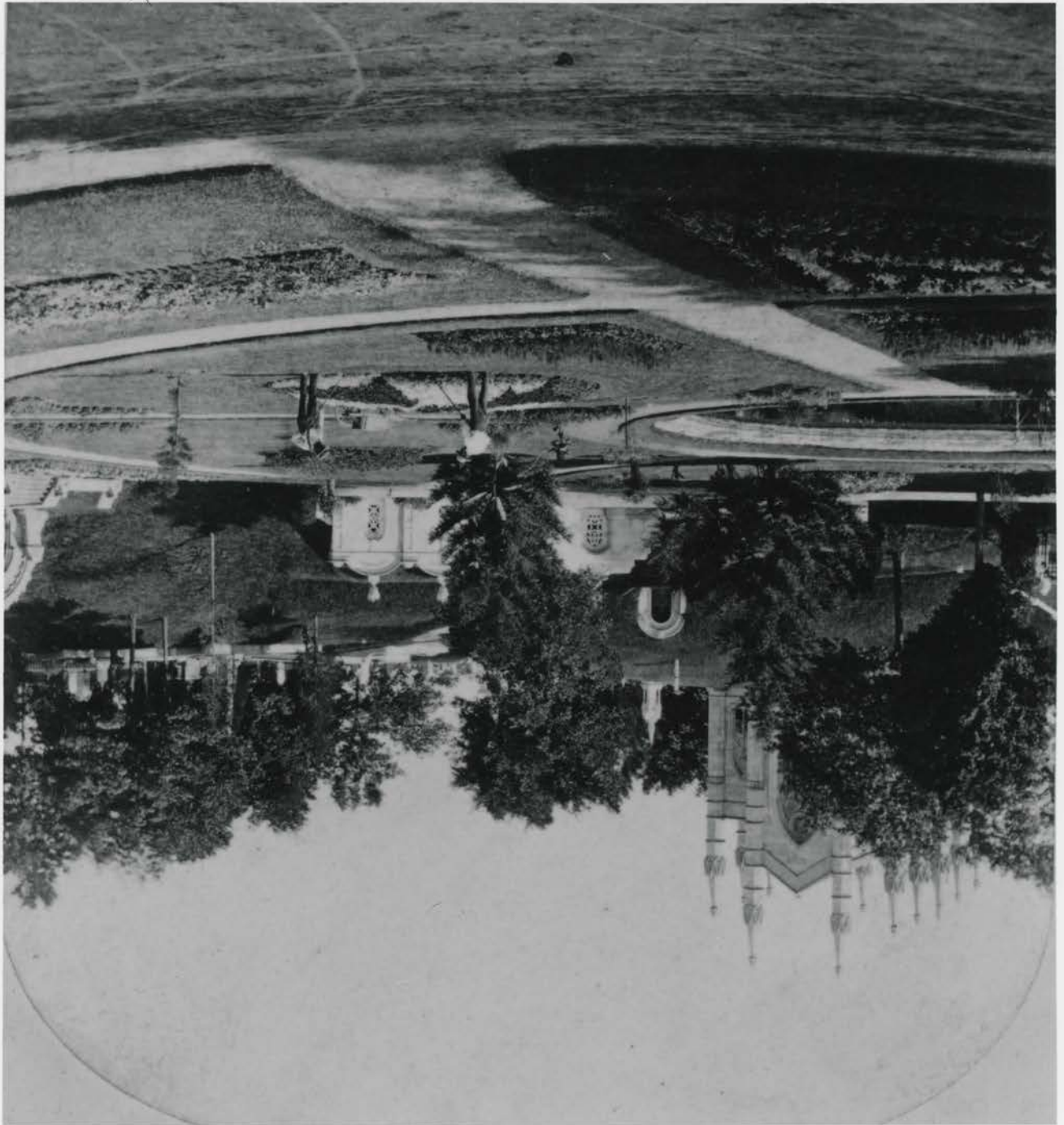
4 IDENTIFICATION

DESCRIBE VIEW, DIRECTION, ETC. IF DISTRICT, GIVE BUILDING NAME & STREET
looking southeast at the Bulfinch Memorial

PHOTO NO. 3

#3084

PROPERTY OF THE NATIONAL REGISTER



Mount Auburn Cemetery
Cambridge, MA

Asa Gray Garden and Bigelow
Chapel, ca. 1870

Stereoscopic view - photo-
grapher unknown

Do not reproduce without
permission

Scots Fence Application with Attachments 76

UNITED STATES DEPARTMENT OF THE INTERIOR
NATIONAL PARK SERVICE

**NATIONAL REGISTER OF HISTORIC PLACES
PROPERTY MAP FORM**

FOR NPS USE ONLY

RECEIVED APR 1 1975

DATE ENTERED

APR 21 1975

SEE INSTRUCTIONS IN *HOW TO COMPLETE NATIONAL REGISTER FORMS*
TYPE ALL ENTRIES -- ENCLOSE WITH MAP

1 NAME

HISTORIC

Mount Auburn Cemetery

AND/OR COMMON

same

2 LOCATION

CITY, TOWN

Cambridge

___ VICINITY OF

COUNTY

Middlesex

STATE

MA

3 MAP REFERENCE

SOURCE

United States Geological Survey, Lexington, Mass. Quadrangle

SCALE

1:24,000

DATE

1971

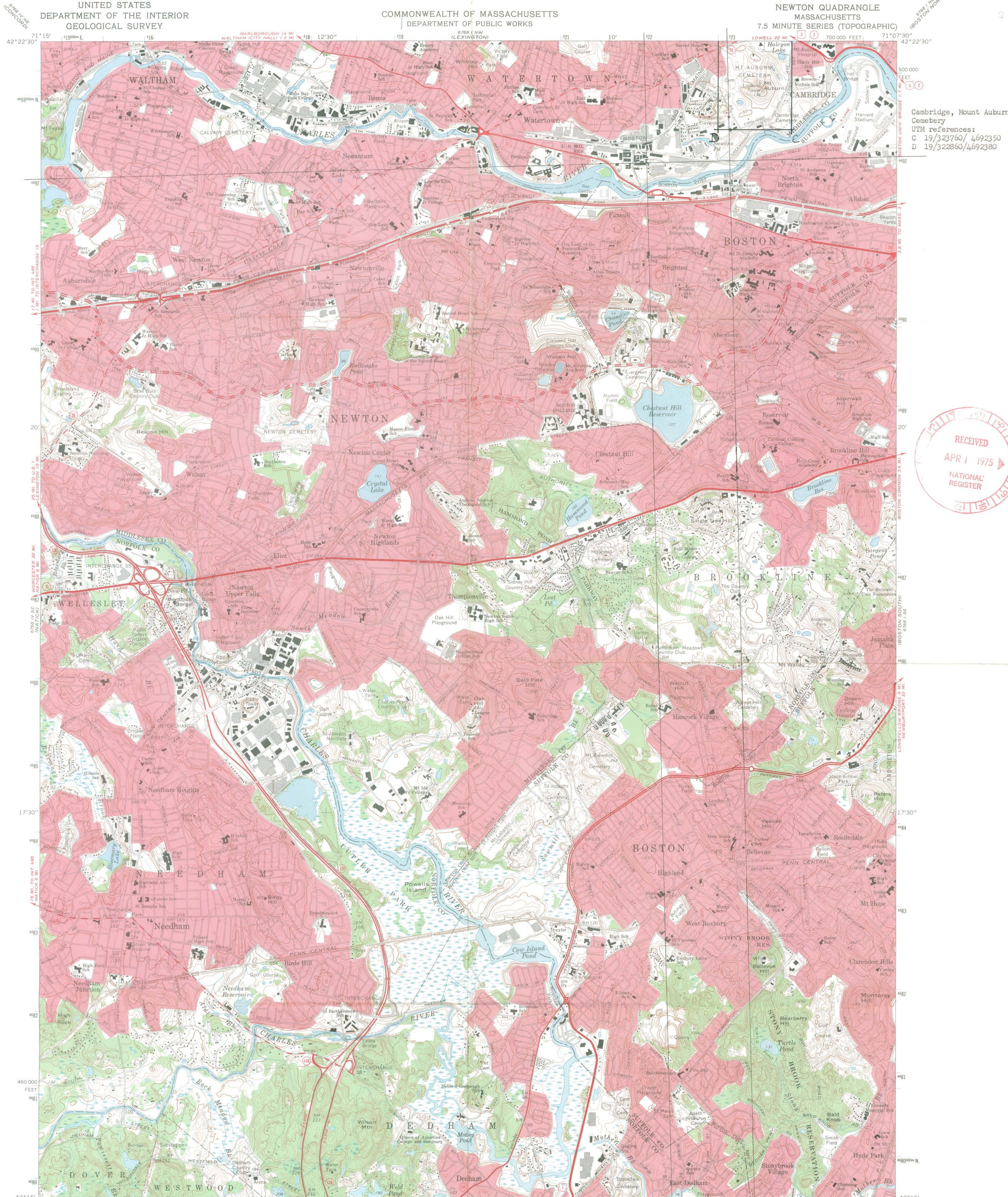
4 REQUIREMENTS

TO BE INCLUDED ON ALL MAPS

1. PROPERTY BOUNDARIES
2. NORTH ARROW
3. UTM REFERENCES

INT: 2986-75

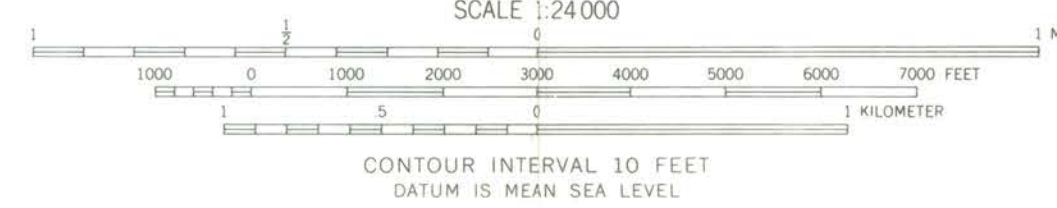
Scots Fence Application with Attachments 77



Cambridge, Mount Auburn Cemetery
UTM references:
C 19/323760/4692350
D 19/322860/4692380



Maped, edited, and published by the Geological Survey
Control by USGS, USC&GS, and Massachusetts Geodetic Survey
Planimetry by photogrammetric methods from aerial photographs
taken 1939. Topography by planimetric surveys 1943.
Revised from aerial photographs taken 1969. Field checked 1970
Polyconic projection: 1927 North American datum
10,000-foot grid based on Massachusetts coordinate system,
mainland zone
1000-meter Universal Transverse Mercator grid ticks,
zone 19, shown in blue
Red tint indicates areas in which only landmark buildings are shown



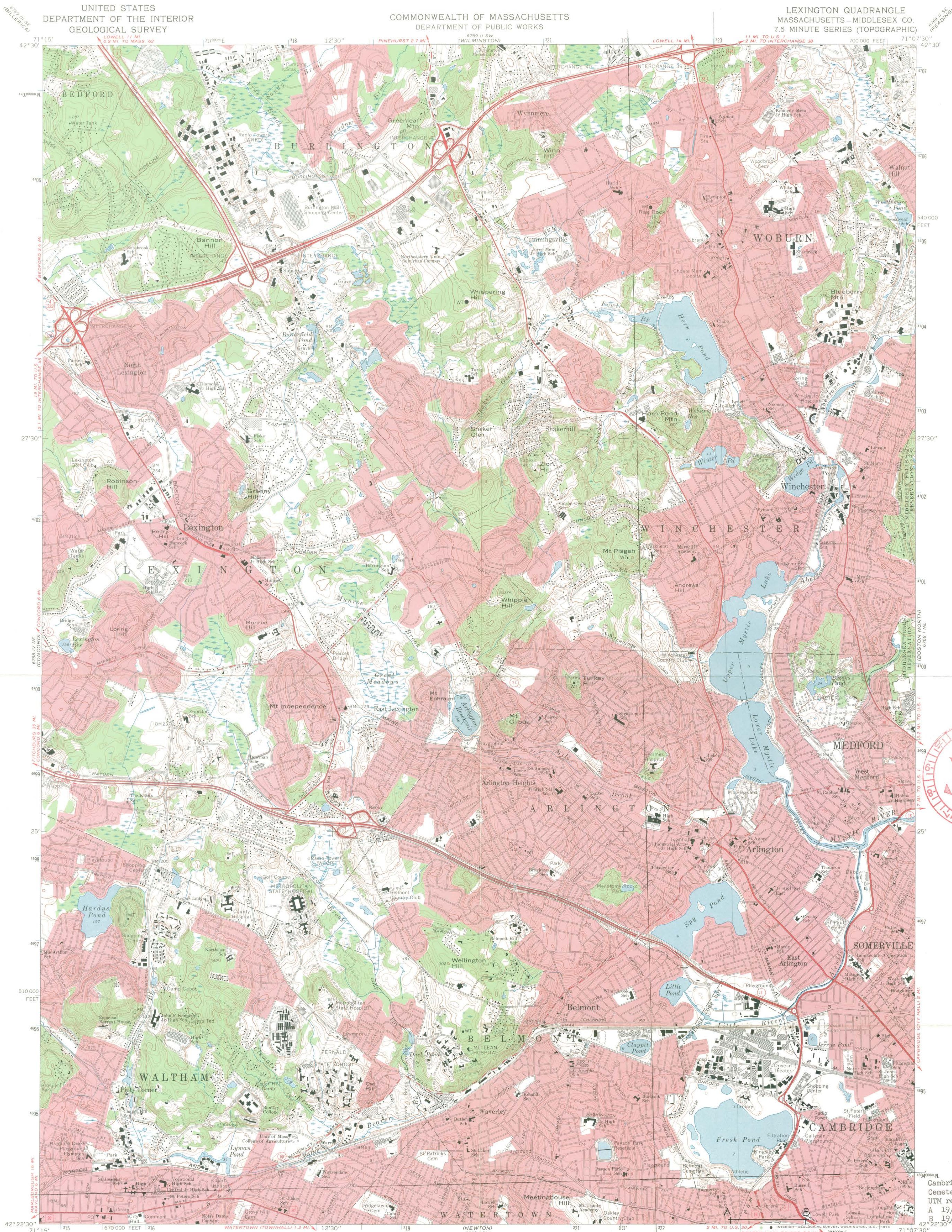
ROAD CLASSIFICATION

Primary highway, hard surface	Light-duty road, hard or improved surface
Secondary highway, hard surface	Unimproved road
Interstate Route	U.S. Route
	State Route



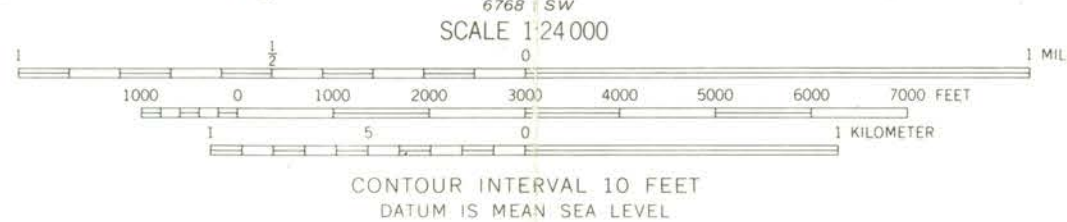
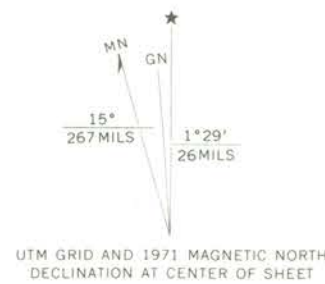
NEWTON, MASS.
N4215-W7107.5/7.5
1970

THIS MAP COMPLIES WITH NATIONAL MAP ACCURACY STANDARDS
FOR SALE BY U.S. GEOLOGICAL SURVEY, WASHINGTON, D.C. 20242
A FOLDER DESCRIBING TOPOGRAPHIC MAPS AND SYMBOLS IS AVAILABLE ON REQUEST



Mapped, edited, and published by the Geological Survey
Control by USGS, USC&GS, and Massachusetts
Geodetic Survey

Planimetry by photogrammetric methods from aerial
photographs taken 1939. Topography by planetable surveys 1943
Revised from aerial photographs taken 1969. Field checked 1971
Polyconic projection. 1927 North American datum
10,000-foot grid based on Massachusetts coordinate system,
mainland zone
1000-meter Universal Transverse Mercator grid ticks,
zone 19, shown in blue
Red tint indicates areas in which only landmark
buildings are shown



CONTOUR INTERVAL 10 FEET
DATUM IS MEAN SEA LEVEL

ROAD CLASSIFICATION
Primary highway, hard surface
Secondary highway, hard surface
Unimproved road
Interstate Route
U.S. Route
State Route



LEXINGTON, MASS.
N4222.5—W7107.5/7.5

1971

AMS 6768 1 NW—SERIES, Scots Fence Application with Attachments 79

UNITED STATES DEPARTMENT OF THE INTERIOR
NATIONAL PARK SERVICE

**NATIONAL REGISTER OF HISTORIC PLACES
PROPERTY MAP FORM**

FOR NPS USE ONLY

RECEIVED

APR 1 1975

DATE ENTERED

APR 21 1975

SEE INSTRUCTIONS IN *HOW TO COMPLETE NATIONAL REGISTER FORMS*
TYPE ALL ENTRIES -- ENCLOSE WITH MAP

1 NAME

HISTORIC

Mount Auburn Cemetery

AND/OR COMMON

Same

2 LOCATION

CITY, TOWN

Cambridge

____ VICINITY OF

COUNTY

Middlesex

STATE

MA

3 MAP REFERENCE

SOURCE

United States Geological Survey, Newton, Mass. quadrangle

SCALE

1:24,000

DATE

1970

4 REQUIREMENTS

TO BE INCLUDED ON ALL MAPS

1. PROPERTY BOUNDARIES
2. NORTH ARROW
3. UTM REFERENCES

INT: 2986-75

Scots Fence Application with Attachments 81

Property Mount Auburn Cemetery

Middlesex

State Massachusetts

Working Number 4.1.75.589

TECHNICAL

Photos 4

Maps 2 USMS

*not really a district, but very
impressive*

CONTROL

OK ^{cm} 4.4.75

HISTORIAN

*Accept
W. R. Luce
4/8/75*

ARCHITECTURAL HISTORIAN

*ACCEPT
LEBOVICH
4-7-75*

ARCHEOLOGIST

OTHER

HAER

Inventory _____

Review _____

REVIEW UNIT CHIEF

*Accept
Cole
4.11.75*

BRANCH CHIEF

*accept
Buntz
4.16.75*

KEEPER

*for Muntz
4.17.75*

National Register Write-up _____

Federal Register Entry _____

Send-back _____

Re-submit _____

Entered APR 21 1975

INT:2106-74

Scots Fence Application with Attachments 82

4

ENTRIES IN THE NATIONAL REGISTER

STATE **MASSACHUSETTS**

Date Entered **APR 21 1975**

<u>Name</u>	<u>Location</u>
Unitarian Universalist Church and Parsonage	Medford Middlesex County
City Hall Historic District	Lowell Middlesex County
First Baptist Church	New Bedford Bristol County
Powder House Park	Somerville Middlesex County
Mount Auburn Cemetery	Cambridge Middlesex County

Also Notified

Hon. Edward M. Kennedy
Hon. Edward W. Brooke
Hon. Torbert H. MacDonald
Hon. Paul E. Tsongas
Hon. Jerry E. Studds
Hon. Thomas P. O'Neill, Jr.
Regional Director, North-Atlantic Region

State Historic Preservation Officer
Mrs. Elizabeth R. Amadon
Executive Director
Massachusetts Historical Commission
40 Beacon Street
Boston, Massachusetts 02108

PR

MMott/bsh

Scots Fence Application with Attachments 83
4/22/75

NR Data Sheet

DATE: 6-7-77
Reviewer INITIALS: [Signature]
NR DOE April 21, 1975

NAME AS IT APPEARS IN FEDERAL REGISTER: Mount Auburn Cemetery

OTHER NAMES:

LOCATION:

STREET & NUMBER 580 Mount Auburn Street

CITY, TOWN Cambridge

CONGRESSIONAL DISTRICT 8th

STATE Massachusetts

VICINITY OF

COUNTY Middlesex code 017

OWNER OF PROPERTY: (Circle) PRIVATE STATE LOCAL GOV'T MUNICIPAL COUNTY OTHER

ADMINISTRATOR (underline)

FEDERAL (AGENCY NAME):

NPS REGION: (CIRCLE) N. ATLANTIC MID ATLANTIC SOUTHEAST MIDWEST

SOUTHWEST ROCKY MOUNTAIN WEST PACIFIC NORTHWEST

FEATURES:

INTERIOR

- Substantially intact-1
- unknown - 4
- not applicable - 7

EXTERIOR

- Substantially intact-2
- unknown - 5
- not applicable - 8

ENVIRONS

- Substantially intact-3
- unknown - 6
- Not applicable-9

- Interior, exterior, environs not intact-0

CONDITION -

- EXCELLENT
- GOOD
- FAIR

- DETERIORATED
- RUINS
- UNEXPOSED
- Unexcavated

- UNALTERED
- ALTERED
- Reconstructed
- Excavated

- ORIGINAL SITE
- MOVED
- Unknown

ACCESS -

- Yes-restricted

- Yes-unrestricted

- No access

- Unknown

historic district?

YES

NO

WITHIN NATIONAL REGISTER HISTORIC DISTRICT?

YES

NO

IF YES, NAME:

WITHIN NATIONAL HISTORIC LANDMARK?

YES

NO

IF YES, NAME:

ADAPTIVE USE:

YES

NO

Saved?

YES

NO

FUNCTION(S): (use vocabulary words)

then-

now-

park, cemetery
park, cemetery

SIGNIFICANCE:

- ARCHEOLOGY-PREHISTORIC

- ARCHEOLOGY-HISTORIC

- AGRICULTURE

- ARCHITECTURE -4

- ART

- COMMERCE

- COMMUNICATIONS

- CONSERVATION

- ECONOMICS

- EDUCATION

- ENGINEERING

- EXPLORATION

- INDUSTRY

- INVENTION

- LANDSCAPE ARCHITECTURE

- LAW/Gov't/politics

- LITERATURE

- MILITARY

- MUSIC

- PHILOSOPHY

- POLITICS/GOVERNMENT

- RELIGION

- SCIENCE

- SOCIAL/HUMANITARIAN

- TRANSPORTATION

- OTHER (SPECIFY)

- entertainment

- health

- recreation

- settlement

- socio/cultural

- urban & commun planning

Claims

"first"

YES

NO

"oldest"

YES

NO

"only"

YES

NO

Scots Fence Application with Attachments 84

ARCHITECTURAL STYLE: GREEK REVIVAL / EGYPTIAN REVIVAL / GOTHIC REVIVAL

architect/~~DR. JACOB BIGELOW~~ DR. JACOB BIGELOW /

GRIDLEY J.F. BRYANT

engineer:

landscape/garden designer: WILLARD T. SEARS

artist/artisan:

interior decorator: Alexander Wadsworth

builder/contractor:

ETHNIC GROUP:

NAMES:

(label role
&
appropriate date)

personal (1) DR. JACOB BIGELOW - PRIME MOVER BEHIND THE
ESTABLISHMENT OF MT. AUBURN CEMETERY.

events

institutional

DATES:

DATE OF CONSTRUCTION (Specific date or 1/4 of century): 1831

DATE(S) OF "MAJOR" ALTERATIONS:

HISTORICALLY SIGNIFICANT DATE(S):

SOURCE:

(OF NOMINATION)

PRIVATE

STATE

LOCAL GOV'T

MUNICIPAL

COUNTY

OTHER

FEDERAL AGENCY:

ACREAGE:

(to nearest tenth of an acre)

170

COMMENTS: (include architectural information here)

Extensive cemetery containing predominantly wooden, marble, and
brownstone tombs, sarcophagi,obelisks and headstones
commemorating over 70,000 interments. Most notable structures
include the Egyptian Revival Entrance Gate (1843), the
exotic Gothic Revival Bigelow Chapel (1843, rebuilt 1858) and a
65' granite block tower designed by Gridley J.F. Bryant
(1853). Contains graves of numerous renowned

SIGNIFICANCE: (maximum two sentences)

Bostonians including Charles Bulfinch, Dorothea Dix,
Oliver Wendell Holmes, Winslow Homer, Margaret Fuller, and others.

Country's 1st rural garden cemetery; served as model for
numerous suburban burial grounds established throughout the east
during the 19th C.; combined emerging ideas in horticulture and
landscape design;



The Commonwealth of Massachusetts

William Francis Galvin, Secretary of the Commonwealth
Massachusetts Historical Commission

26 November 2013

Mr. J. Paul Loether
National Register of Historic Places
Department of the Interior
National Park Service
1201 Eye Street, NW 8th floor
Washington, DC 20005

Re: Mount Auburn Cemetery, Cambridge and Watertown. NRIS 75000254

Dear Mr. Loether:

It has recently been brought to our attention that Mount Auburn Cemetery (NR 4/21/1975 and NHL 5/27/2003) is included in the National Register Information System (NRIS) only under Cambridge. This may be a reflection of the 1975 National Register nomination form, which only listed Cambridge.

At the time of the NHL listing, both Cambridge and Watertown were cited in the NHL nomination; and Carol Schull's 2003 acknowledgement also identifies both Cambridge and Watertown. I am enclosing the first page of the NHL nomination and Carol Schull's letter.

We would be grateful if you would change the references in the NRIS to show both Cambridge and Watertown in the NRIS.

Thank you for your assistance.

Sincerely,

Betsy Friedberg
National Register Director
Massachusetts Historical Commission

enclosures

cc: David Russo, Watertown Historical Commission
Charles Sullivan, Cambridge Historical Commission

NATIONAL HISTORIC LANDMARK NOMINATION

NPS Form 10-900

USDI/NPS NRHP Registration Form (Rev. 8-86)

OMB No. 1024-0018

MOUNT AUBURN CEMETERY

United States Department of the Interior, National Park Service

Page 1

National Register of Historic Places Registration Form

1. NAME OF PROPERTY

Historic Name: Mount Auburn Cemetery

Other Name/Site Number: n/a



2. LOCATION

Street & Number: Roughly bounded by Mount Auburn Street,
Coolidge Avenue, Grove Street, the Sand Banks
Cemetery, and Cottage Street

Not for publication:___

City/Town: Watertown and Cambridge

Vicinity:___

State: Massachusetts Code: MA County: Middlesex Code: 017

Zip Code: 02472 and 02318

3. CLASSIFICATION

Ownership of Property

Private: ☒

Public-Local: ☐

Public-State: ☐

Public-Federal: ☐

Category of Property

Building(s): ☐

District: ☒

Site: ☐

Structure: ☐

Object: ☐

Number of Resources within Property

Contributing

4

1

6

15

26

Noncontributing

4 buildings

 sites

4 structures

 objects

8 Total

Number of Contributing Resources Previously Listed in the National Register: 26

Name of Related Multiple Property Listing: n/a



United States Department of the Interior

NATIONAL PARK SERVICE
1849 C Street, N.W.
Washington, D.C. 20240

JUN 09 2003

MASS. HIST. COMM

IN REPLY REFER TO:

H3417(2280)

JUN 4 2003

Ms. Cara Metz, SHPO
Massachusetts Historical Commission
220 Morrissey Boulevard
Boston, Massachusetts 02125

Dear Ms. Metz:

I am pleased to inform you that the Mount Auburn Cemetery in Watertown and Cambridge, Massachusetts, has been found to possess national significance in the history of the United States. As a result, the Secretary of the Interior designated this property a National Historic Landmark on May 27, 2003.

The purpose of landmark designation is to identify and recognize nationally significant sites and to encourage their owners to preserve them. Landmarks are chosen after careful study by the National Park Service. They are evaluated by the National Park System Advisory Board and designated by the Secretary of the Interior in accordance with the Historic Sites Act of 1935 and the National Historic Preservation Act of 1966.

Designation as a National Historic Landmark automatically places a property in the National Register of Historic Places, if it is not already so listed, and extends to it the safeguards and benefits provided by the National Historic Preservation Act of 1966 and other Federal laws protecting historic properties.

Each Landmark is eligible to receive one bronze plaque to commemorate the property's designation. The owner(s) will shortly be contacted by a National Historic Landmarks coordinator for their area about applying for their plaque. If you have any questions about the plaque or the designation please contact Ms. Patty Henry of the National Historic Landmarks Survey at 202/354-2216.

We are pleased to include the Mount Auburn Cemetery on the roll of National Historic Landmarks as significant representatives of our Nation's heritage.

Sincerely,

Carol D. Shull
Chief, National Historic Landmarks Survey and
Keeper, National Register of Historic Places

Mount Auburn Cemetery (Resource Name)	75000254 (Reference Number[s])	1118104 (Date form completed)
Middlesex County (County)	MA (State)	SPRINKLE (Completed by)

STATUS:

1. MISSING _____ 2. REMOVED/ _____ 3. NHL ☒ 4. TR _____ 5. MRA _____ 6. OVER- _____ 7. NPS - _____ 8. DOE - _____ 9. RESTRICTED _____
DEMOLISHED SIZED UNDOCUMENTED OWNER OBJECTION

EXPLANATION:

1. Missing Status: Entire Folder (); Nomination (); Map(s) (); Photos ()
Available on: Microfiche (); Optical Disk ()

2. _____
(Cause for removal)

1 / 1
(Date Removed)

3. _____
(NHL Name, if different than NRHP Name)

512712003
(Date Designated)

4. _____
(If multi-state/county TR, state/county where filed and location)

(TR or MRA Name)

5. _____
(If multi-state/county MRA, state/county where filed and location)

6. _____
(Location of oversize file)

7. _____
(Current source of partial documentation)

1 / 1
(Target Date)

COMMENTS:

(Where found, or source of replacement)

1 / 1
(Date Found/Replaced)

NATIONAL PARK SERVICE

National Register of Historic Places
Locator Card

WASO 21
JAN. 1986



The Commonwealth of Massachusetts

HOUSE OF REPRESENTATIVES
STATE HOUSE, BOSTON, MA 02133-1054

STEVEN C. OWENS
STATE REPRESENTATIVE
29th MIDDLESEX DISTRICT

Committees:
Telecommunications, Utilities
and Energy
Financial Services
Global Warming
and Climate Change
Steering, Policy
and Scheduling

STATE HOUSE, ROOM 540
TEL: (617) 722-2090
Steven.Owens@MAhouse.gov

Watertown Community Preservation Committee
City Administration Building
149 Main Street
Watertown, MA 02474

Dear members of the Watertown Community Preservation Committee,

As the representative of the 29th Middlesex district of the Massachusetts House of Representatives and a Watertown resident, I am providing this letter of support for Mount Auburn Cemetery's Scots' Charitable Society Lot Fence restoration project.

I personally enjoy my peaceful walks amongst the trees and monuments of Mount Auburn, and I know that I am not alone. Many Watertown residents – and people from all over the region – visit the cemetery daily because it is not just a place for mourning, but a beloved green space. This is especially evident since the start of the pandemic.

Mount Auburn is more than just a cemetery; it's a significant garden, wildlife refuge, and place of deep historic value to Watertown and beyond. There are over 200 individuals interred in the Scots' Charitable Society Lot, all working-class Scottish immigrants whose lives are reflected by Watertown's diverse population, many of whom pass by the Lot's deteriorating fence when they visit Mount Auburn. Though these buried individuals are not marked within the lot itself, the beautiful surrounding cast-iron fence is a piece of art worth preserving. Those interred there endured through periods of disease, war, and uncertainty in the 19th and 20th centuries and merit a respectable form of memorialization. Securing support for the Scots' Fence will help Mount Auburn restore the honor this community deserves and act as a wonderful opportunity to educate and engage with Watertown on a frequently overlooked piece of its history.

I support Mount Auburn's seeking of funds from the Community Preservation Act for this restoration effort. Too often the histories of our immigrant ancestors unfortunately become fractured and prone to complete loss like the cracked granite bases of the Scots' Fence. Any opportunity to preserve Watertown's unique history is a benefit to the community, and I look forward to seeing the fence of the Scots' Charitable Society Lot stand proudly as I continue my walks through the beautiful landscape of Mount Auburn Cemetery for years to come.

Sincerely,

Steven C. Owens
Massachusetts State Representative
29th Middlesex District



CITY OF WATERTOWN
Historical Commission
Administration Building
149 Main Street
WATERTOWN, MASSACHUSETTS 02472

Elise Loukas, Chairperson
Susan Steele, Member
Marilynne K. Roach, Member
Joseph Panto, Member
Matthew Walter, Member
Richard Glenn, Member
Edward McCourt, Member

October 26, 2023

Andrew Gambrella,
Grants and Communications Manager
Mt. Auburn Cemetery
580 Mt. Auburn Street
Cambridge, MA 02138

Dear Mr. Gambrella,

I am pleased to provide this letter from the Watertown Historical Commission in support of Mt. Auburn Cemetery's application to help fund restoration of the Scots' Fence.

The Historical Commission did not need to make a determination of historical significance of your project as Mt. Auburn Cemetery is on the Historical Register. Mt. Auburn Cemetery is mainly located in Watertown and the Scots' Fence is located within Watertown. The Scots' Fence is clearly historical and an asset to the history of the City of Watertown.

Your presentation to the Historical Commission about the Scots' Fence and the need for restoration was detailed and compelling. In 1841, the Scots' Charitable Society purchased the lot for people of Scottish heritage who could not afford a burial. There are 200 internees that were buried within the fence during that era who had succumbed to disease, as well as members of the armed services. The fence was custom designed in 1847 by Architect Theodore Voelckers. It is an exemplary example of 19th century funerary art and one of the most significant memorials within Mt. Auburn Cemetery. The custom design is adorned with hand-crafted downturned torches and pineapples, an important example of handmade craftsmanship (unfortunately, among the crafts that have been seriously declining over the years).

As you described, restoration is needed because the fence's granite bases are crumbling and the cast iron posts are settling and leaning, which are putting stress on the railings and pickets. In

addition, many ornamental details have gone missing and become damaged, and failing lead paint is leading to further corrosion.

The Historical Commission is confident in Mt. Auburn Cemetery's ability to successfully manage this restoration project. Mt. Auburn Cemetery won the Commission's 2023 Environmental Preservation Award for its outstanding restoration of Indian Ridge's historic landscape.

The Historical Commission unanimously agreed to support Mt. Auburn Cemetery's project. We thank you and Mt. Auburn Cemetery for your dedication to preserving Watertown's historical assets and look forward to your plans to expand the educational programming you offer to our schools.

Sincerely,



Elise Loukas

Chair

1. Please clarify the relationship between the Friends of Mt. Auburn Cemetery and Mt. Auburn Cemetery and confirm that the Friends group has permission to conduct the project.

The Friends of Mount Auburn Cemetery (FOMAC), a 501(c)(3) nonprofit, was established in 1986 as the philanthropic arm of Mount Auburn Cemetery (MAC) 501(c)(13). The aim of FOMAC is to fundraise for projects that align with the cemetery mission of inspiring all who visit, comforting the bereaved, and commemorating the dead in a landscape of exceptional beauty. MAC and FOMAC work in sync to budget and coordinate fundraising for capital projects that are determined to support our mission which are considered priorities each fiscal year.

Over the past several years, some of these fundraising efforts specifically for monument preservation have included the restoration of our Egyptian Revival gateway, restoration of the rose window in Bigelow Chapel, and the preservation of several monuments in our Significant Monument Collection as determined by Mount Auburn Cemetery staff Meg Winslow Curator of Historical Collections and Archives, and Gus Fraser, Vice President of Preservation and Facilities.

2. Provide evidence or a commitment letter for the \$75,000 in funding from Scots Charitable Society. (provide this in writing)

See attached *Scots Charitable Society Appeal letter* authored in collaboration with Rob Young at the Scots Charitable Society which mentions a \$50,000 pledge in addition to a \$25,000 challenge grant committed by Helen Sayles, totaling \$75,000.

3. Clarify who is on the team and their roles.

Project Team:

Project Manager: Mount Auburn Cemetery

Gus Fraser, Vice President of Preservation & Facilities, Mount Auburn Cemetery

Jennifer Mayo, Capital Projects Manager, Mount Auburn Cemetery

Preservation Architect: Foster Architecture

Ryan Foster, Principal Architect, Foster Architecture

Erik Christensen, Architect, Foster Architecture

Cast Iron Restoration Contractor:

Cassidy Bros. Forge, Rowley, MA

Stone Masonry Contractor:

Phoenix Bay State Construction, Boston, MA

4. Is horticulture a part of this project? Scottish themed plantings are mentioned. Is there a planting plan and are these plantings native or compatible with this region?

See attached *Scots Charitable Society Horticultural Improvements Project Description*

5. How was the timeline developed and is it dependent on fundraising success?

The construction timeline was developed in consultation with the contractors selected for the work and includes their expected durations of the phases of the project. See attached *Project Durations* chart.

The start date is flexible and will be set when fundraising goals are reached. The timing of onsite work will be weather dependent, and winter conditions such as snow and deep-freezing temperatures may result in delays in starting or completing weather sensitive outdoor work. Horticulture planting will take place in either fall or spring after fence reinstallation is complete.

6. Explain the statement that the project will go forward once 60% is raised. Is the 60% needed to go forward coming from non-CPA sources?

Mount Auburn executive leadership has determined that for the viable completion of the project, FOMAC contributions received should amount to 60% of the project budget.

While there is a possibility that 60% could come from non-CPA sources, including a list of past preservation supporters, targeted major gift prospects, family foundations, the Scots' Charitable Society and their membership base, we anticipate CPA funds would be included in this 60%. As an organization with a long history of preservation work that is resolving to expand our community outreach, we look forward to partnering with Watertown on this project.

7. Provide more information about your fundraising plan and status. How would you respond if the CPC conditioned the release of funds on the availability of sufficient funds (from other sources) to complete the project? (provide this in writing)

A mail appeal to donors which was originally scheduled for October, was rescheduled to January due to unforeseen circumstances- challenge grant of \$25,000 from Helen Sayles, chair of the National Trust for Scotland Foundation USA, was added to appeal materials, and sent during the week of Robbie Burns Day (1/25)- a significant Scottish national holiday.

Mount Auburn is also following up on 8 major gift proposals and intends to identify further prospects, which have the potential to yield several 5 to 6 figure gifts.

Mount Auburn would be willing to condition the release of funds based on the availability of sufficient funds raised.

8. Clarify budget details.

a. How were costs estimated and which documents support these estimates?

See the attached *Project Budget* with Foster Architecture proposal and contractor bids. Costs for horticultural improvements were developed by Mount Auburn Cemetery staff and are in the project description.

Costs for cast iron restoration and masonry work are based on competitive contractor bids on final construction drawings and specifications. The winning bids are attached.

Costs for horticulture were created by Mount Auburn's in-house horticulture team and include plant pricing from commercial growers and a labor estimate by our horticulture team. The irrigation estimate was generated by Mount Auburn's irrigation team.

b. There is no quote for Foster Architecture construction administration services and no quote for horticulture. (provide this in writing)

Foster Architecture Proposal dated 8-12-2022 is included in the *Project Budget*.

Estimates for horticulture and irrigation are provided on the *Scots Charitable Society Horticultural Improvements Project Description*.

c. Is a contingency needed?

Contingency is included in the attached *Project Budget*.

Scots Charitable Society - Cat Iron Lot Fence Restoration

Project Budget

	Cost	Notes
Preservation Design		
Foster Architecture		See architect's proposal dated 8/12/2022
Design Development	\$ 4,200	
Construction Documents	\$ 8,500	
Bidding	\$ 1,500	
Construct Administration	\$ 13,500	
Reimbursables (allowance)	\$ 500	
Subtotal: Design	\$ 28,200	
Construction		
Cassidy Brothers Forge	\$ 336,700	See contractor bid dated 7/28/2023
Alternates		
Pickets	\$ 18,300	
Phoenix Bay State Construction	\$ 335,726	See contractor bid dated 9/9/2023
Alternates		
Quincy granite ILO Rockport	N/A	
printed construction fence scrim	\$ 4,132	
Subtotal: Construction	\$ 694,858	
Contingency	\$ 34,743	5% contingency on the construction subtotal
Other		
Landscape (materials and labor)	\$ 21,476	Mount Auburn Cemetery estimate
Irrigation (materials and labor)	\$ 3,500	Mount Auburn Cemetery estimate
Subtotal Other	\$ 24,976	
Total	\$ 782,777	

Scots Charitable Society Lot Fence Restoration

Project Durations

	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7
Onsite - mobilize contractors, Install construction fencing, (one week)							
Onsite - Dismantle fence and remove to cast iron workshop (3 weeks)							
Offsite - fabricate granite replacement tops for corner posts							
Onsite - install replacement caps for corner posts							
Offsite fence repair/restoration at Cassidy workshop							
Onsite - Reinstall Fence							
Onsite - Horticulture/Planting							

Notes

Start date is flexible

Onsite work will be suspended during winter weather

Horticulture/planting will take place after reinstallation of fence is complete, and timed to coincide with spring or early fall



Date

Addressee

Address

City, State Zip

Dear Salutation,

Walking the paths of Mount Auburn, you may be naturally drawn to the stories of those whose names are etched in stone or emblazoned in bronze upon the many monuments that dot the grounds. As the Trustee of the Graves for the Scots' Charitable Society of Boston, I'd like to draw your attention to the easy-to-miss story of the individuals within the cast-iron fence at the corner of Fir and Walnut Avenues across from Consecration Dell.

In 1841, the Scots' Charitable Society of Boston purchased a large burial space at the new, innovative Mount Auburn Cemetery. With this lot, we were able to provide burial space free-of-cost to over 200 Scottish citizens, most of whom were working-class and died from diseases that were incurable without modern medicine, such as tuberculosis. From the first interment of farmer John Miller in 1841 to my own father, James Robertson Young, who was the last to be buried within the lot in 1990, these individual histories tell a broader story of Scottish perseverance throughout the past two centuries.

The remarkably ornate fence that encloses the lot memorializes this population while acting as a symbol of Scottish national pride, with thistles, rampant lions, battleaxes, and the image of St. Andrew on both gates. After years of exposure and previous repair attempts, the granite bases holding up the fence are failing, and the iron work supported by these bases will soon follow.

Please read the enclosed brochure to learn more about the history of this one-of-a-kind monument as well as a detailed plan by Mount Auburn's preservation team to restore it to its original glory.

The Scots' Charitable Society has pledged \$50,000 to help Mount Auburn restore the fence, and I'd like to extend many thanks to Helen Sayles, chair of the National Trust for Scotland Foundation, who has issued a \$25,000 matching grant challenge for this incredible work. Your gift will help activate these matching funds, and enable Mount Auburn to continue to ensure the memorialization of these immigrants will live on well into the future.

With gratitude,

Robert Young

Trustee of the Graves, Scots' Charitable Society of Boston

Scots Charitable Society Lot Fence Restoration & Horticultural Improvements

Horticultural Improvements Project Description

The Scots Charitable Society is the among the oldest charitable organizations in the western hemisphere and was established to assist indigent immigrants of Scottish descent living in the Boston area. The Society purchased the lot at Mount Auburn Cemetery in 1841 to provide a final resting place for Scottish Americans who did not have the means to pay for proper burial. The Scots Charitable Society Lot fence was designed by architect Theodore Voelckers and made by Society member David Miller in Boston in 1847. The fence is among the most significant remaining example of a 19th century cast iron lot fence at Mount Auburn Cemetery, and is adorned with symbols of Scottish heritage, including the image of St. Andrew, thistles, battle axes, rampant lions and Scottish crests.

To honor the more the 200 individuals of Scottish heritage buried in the lot, the Mount Auburn Cemetery horticulture department created a planting plan utilizing plants that are native to Scotland, but also have a successful history of growing in our local environment. The native Scottish plants will provide horticultural interest, will complement the compelling story of the lot and, by replacing turf, eliminate the need for mowing and string trimming within the lot.

The plant list, quantities and pricing for the planting project is as follows:

Working List (inside fence)

	<u>sf</u>	<u>spacing</u>	<u>Qty</u>	<u>price</u>	<u>cost</u>
<i>Alchemilla alpina</i>	280	24"	70	\$6	\$420
<i>Athyrium filix-femina</i>	475	24"	120	\$6	\$720
<i>Campanula rotundifolia</i>	21	18"	9	\$6	\$54
<i>Carex flacca</i>	870	18"	385	\$10	\$3,850
<i>Sanguisorba officinalis</i>	15	24"	7	\$6	\$42
					\$5,086

Working List (outside fence)

<i>Cytisus scoparius</i>	2	indiv.	2	50	\$100
<i>Sambucus nigra</i>	4	indiv.	4	50	\$200
<i>Sesleria caerulea</i>	900	12-18"	396	5	\$1,980
<i>Silene dioica</i>	900	18"	11	\$10	\$110
					\$2,390

Labor to prepare soils and install plants	\$14,000
Irrigation – labor and materials	<u>\$3,500</u>
Project total	\$24,976

After restoration and reinstallation of the cast iron fence, the soils on the interior and exterior of the lot will be prepared and planted by Mount Auburn Cemetery horticulture staff. An irrigation system installed by Cemetery staff and drawn from Mount Auburn's well will provide irrigation to establish the plants. After installation the Cemetery staff will assume responsibility for yearly maintenance and upkeep of the plantings within and outside the lot.

Scots Lot – Working Plant List

Inside Fence Area

Alchemilla alpina



Athyrium filix-femina



Campanula rotundifolia (accent)



Carex flacca



Sanguisorba officinalis (accent)



Outside Fence Area

Cytisus scoparius



Sambucus nigra



Sesleria caerulea



Silene dioica (accent)



Cladrastis kentukea
(Prune lowest 2 limbs over road)

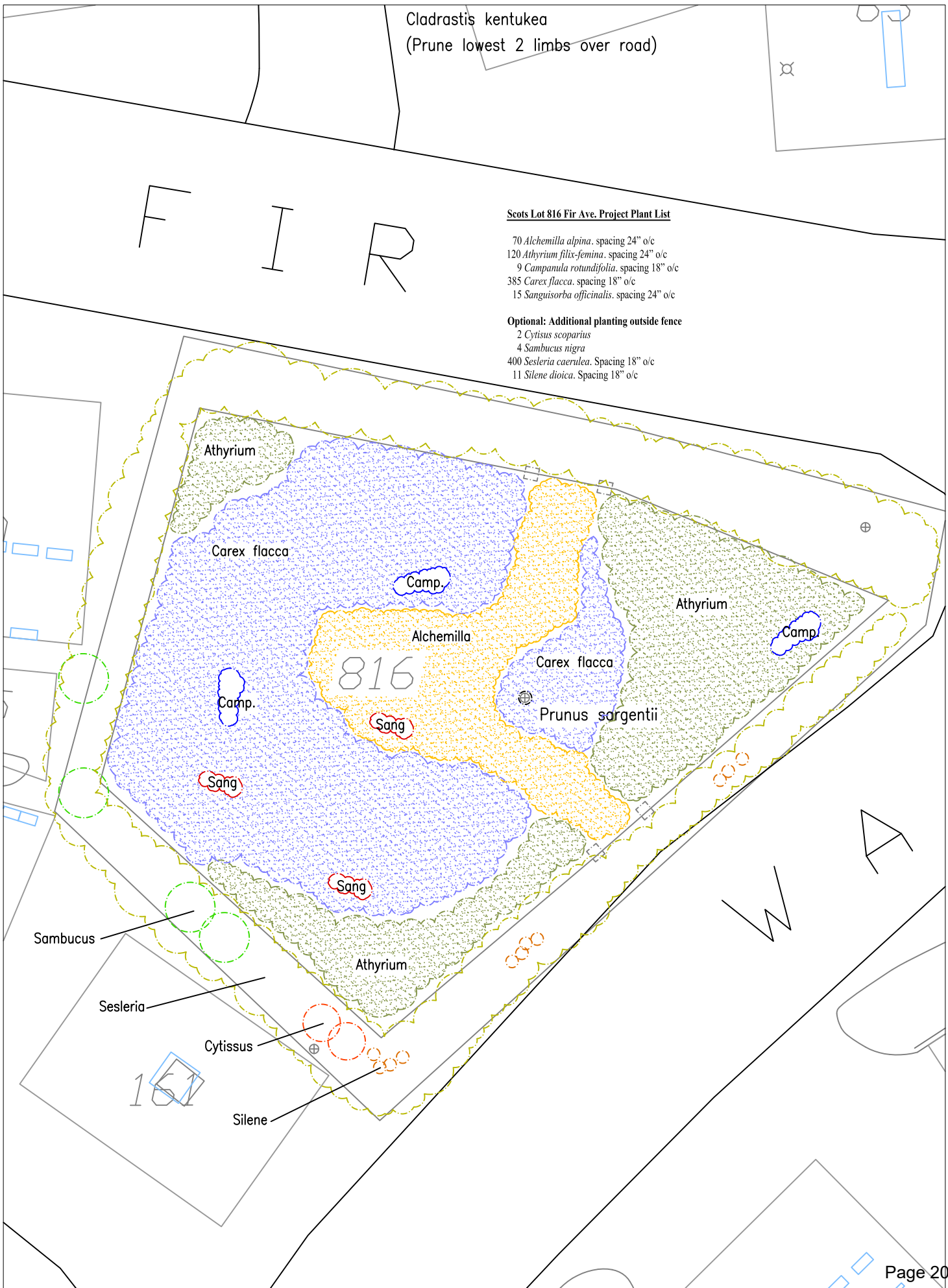
FIR

Scots Lot 816 Fir Ave. Project Plant List

70 *Alchemilla alpina*. spacing 24" o/c
120 *Athyrium filix-femina*. spacing 24" o/c
9 *Campanula rotundifolia*. spacing 18" o/c
385 *Carex flacca*. spacing 18" o/c
15 *Sanguisorba officinalis*. spacing 24" o/c

Optional: Additional planting outside fence

2 *Cytisus scoparius*
4 *Sambucus nigra*
400 *Sesleria caerulea*. Spacing 18" o/c
11 *Silene dioica*. Spacing 18" o/c





Your fully tax-deductible gift to this project directly supports the restoration work of the Scots' Charitable Society Lot Fence and shines a light on the lives of Scottish residents within its borders. Unlock Helen Sayles's generous \$25,000 challenge grant by donating today!



2024-01

Scots' Charitable Society Fence



Contact Information

Beth A. Brown
Vice President of
Institutional Advancement

617.607.1930
bbrown@moundauburn.org
www.moundauburn.org
580 Mount Auburn Street
Cambridge, MA 02138

Scots' Charitable
Society Fence

SPECIAL PROJECTS

Help us Restore This Historic Treasure

LET THE SCOTS' CHARITABLE SOCIETY LOT FENCE STAND PROUDLY

In the 1800s, Mount Auburn housed hundreds of iron fences, most of which have since been removed due to changing tastes at the turn of the 20th century. Of the 62 remaining iron fences at the cemetery, the Scots' Charitable Society Lot Fence is perhaps the most significant.

Thanks to a matching grant from the National Trust for Historic Preservation in 2022 and the generosity of our donors, we were able to engage Foster Architects to complete a condition inspection and assessment of the fence which revealed the great extent of restoration work required to restore this piece of funerary art to its former glory. Now, Mount Auburn needs your help to finish this vital work.



Scots' Charitable
Society Fence

History of the Scots' Charitable Society Lot

At the intersection of Walnut and Fir Avenues, the Scots' Charitable Society Lot Fence is one of the more ornate cast iron fences at Mount Auburn. Purchased in 1841 by the Scots' Charitable Society for its members, this lot memorializes over 200 people of Scottish descent. The large fence designed by architect Theodore Voelkers is adorned with symbols of the heritage of the people buried in the lot, including the image of Saint Andrew, the patron saint of Scotland, as well as thistles, battle axes, rampant lions, and crests.

What makes the lot unique is that there are no headstones or grave markers. Instead, the cast iron fence itself is the memorial. Many working-class people could not afford the costs associated with burial, so the Scots' Charitable Society lot was a resource for members in need. The burials, ranging from 1841 to 1990, reflect a panorama of human stories that highlight the perseverance of immigrants in America.

The Work Ahead

The granite bases holding up the almost two-century-old ironwork are irreparable and require replacement. Repairs from previous decades, which encased the granite in concrete, have unfortunately only hastened their disintegration. In order to replace the bases, the fence will need to be dismantled and removed to a cast iron restoration shop. While removed, the damaged corner posts will be repaired, and replacement pieces will be cast as necessary. Lead paint will be stripped from the entire fence, and the fence will be repainted prior to being shipped and reassembled on site atop new granite bases.

All of this work will be carefully done while respecting the final resting places of over 200 people of Scottish descent buried within the lot. The restoration of the fence honors the risks they took and the difficulties they faced as working-class residents—mostly farmers and tradespeople—of a highly stratified Boston society, often battling diseases like tuberculosis that ravaged the population. Restoring the fence also underlines the generosity of their countrymen who founded the Scots Charitable Society to support Scottish immigrants in poverty and ultimately to provide a dignified final resting place at Mount Auburn Cemetery.

Help us Unlock the Challenge Grant!



Meg Winslow, Curator of Historical Collections & Archives examining a corner post of the Scots' Fence.

You can take action by helping match the generosity of Helen Sayles, chair of the National Trust for Scotland Foundation, who has issued a \$25,000 challenge grant!

Mount Auburn's preservation team prioritizes and takes on numerous projects a year, but larger restoration projects such as the Scots' Charitable Society Lot Fence require advanced specialization and contracting outside of our regular preservation funding. With your support, a completed match totaling \$50,000 in addition to the \$50,000 pledge from the Scots' Charitable Society and anticipated grant funding, we will be able to ensure the fence stands tall for generations to come.



BE A CHAMPION FOR THE SCOTS' CHARITABLE SOCIETY LOT FENCE BY FILLING OUT THIS FORM OR VISITING US AT MOUNTAUBURN.ORG TODAY!

PLEASE INDICATE ALL THAT APPLY:

☐ I/We prefer this gift to remain anonymous.

☐ Check enclosed payable to: Friends of Mount Auburn

☐ I would like to learn about joining The Oak Circle by including Mount Auburn Cemetery in my will or estate plan.

☐ My gift is (circle one) in honor / in memory of:

CONTRIBUTIONS ARE TAX-DEDUCTIBLE TO THE EXTENT ALLOWED BY LAW.

PAYMENT INFORMATION

NAME (as you wish to have it listed in our records and acknowledgment.)

ADDRESS

CITY STATE ZIP

PHONE

EMAIL

☐ PLEASE CHARGE \$ TO MY CREDIT CARD.

CREDIT CARD #

EXPIRATION DATE CVV

☐ MC ☐ VISA ☐ AMEX ☐ DISCOVER

☐ I wish to make a gift of securities and will have my broker contact the Advancement Office at 617.607.1930 for more information.

AT MOUNT AUBURN, I AM INTERESTED IN: (circle all that apply)

- | | |
|-------------------------|---------------------------|
| Birding | History |
| Genealogy | Environmental Stewardship |
| Horticulture | Workshops |
| Walking | Guided Tours |
| Wellness | Speaker Series |
| Preservation | Collections |
| Artists in Residence | Citizen Science |
| Volunteer Opportunities | Public Programs |