

# NEH Application Cover sheet (CLI-293577)

## Climate Smart Humanities Organizations

### PROJECT DIRECTOR

---

Mr. Benjamin Haavik  
Team Leader, Property Care  
151 Essex St.  
Haverhill, MA 01832-5564  
USA

**E-mail:** bhaavik@historicnewengland.org  
**Phone:** 617-994-6610  
**Fax:**

**Field of expertise:** Museum Studies or Historical Preservation

### INSTITUTION

---

Society for the Preservation of New England Antiquities  
Haverhill, MA 01832-5564

### APPLICATION INFORMATION

---

**Title:** *Historic Past, Carbon Neutral Future: Planning for Climate Action at Historic New England*

**Grant period:** From 2023-10-01 to 2024-12-31

**Project field(s):** Architecture; History, General

**Description of project:** Building on more than a decade of capacity building in the area of climate resiliency, Historic New England will undertake an ambitious planning effort to define goals and strategies for advancing resiliency, mitigation, and climate justice goals across a collection of thirty-nine historic properties in five New England states. The project will produce an institutional Climate Action Plan and two actionable project plans for achieving carbon neutrality at high-profile public historic sites in Dorchester, Massachusetts and Saunterstown, Rhode Island.

### BUDGET

---

<b>Outright request</b>	0.00	<b>Cost sharing</b>	48,029.00
<b>Matching request</b>	48,029.00	<b>Total budget</b>	96,058.00
<b>Total NEH request</b>	48,029.00		

### GRANT ADMINISTRATOR

---

Ms. Katherine Pomplun  
151 Essex St.  
Haverhill, MA 01832-5564  
USA

**E-mail:** kpomplun@historicnewengland.org  
**Phone:** 617-994-5954  
**Fax:**

## **Humanities Significance and Impact**

Historic New England, founded in 1910 as the Society for the Preservation of New England Antiquities, is the oldest and largest regional heritage organization in the United States. Our mission is to save and share New England's past to engage and inform present and future generations. We explore and interpret New England's culture and history through our house museums, landscapes, archives, and objects, engaging more than 200,000 visitors annually. We focus on five core areas:

- **Homes, Farms, and Landscapes:** Historic New England's most visible public faces, including [thirty-eight historic sites](#) comprising house museums, farms, exhibition spaces, event spaces, and 1,374 acres of historic landscape.
- **Artifacts, Archives, and Stories:** Our unparalleled collections of 125,000 household objects and 1.5 million archival records that tell the region's stories.
- **Community Engagement and Leadership:** Capturing history as it happens, this includes wide-ranging community partnerships to save and share the stories of New England.
- **School and Youth Programs:** Historic New England's field trips, in-classroom programs, and outreach experiences enrich student learning and are tailored to local and state curriculum standards.
- **Preservation Services Outreach:** Resources for homeowners, communities, professionals, and students to partner in and advocate for historic preservation across the region.

To advance excellence in the humanities, Historic New England:

- Makes our collections and archives of New England cultural and architectural history [accessible to scholars and the public](#).
- Awards an [annual Book Prize](#) to recognize works that advance the understanding of New England life by examining architecture, landscape, decorative arts, preservation, photography, and related areas.
- Pioneers [new research at the Historic New England Study Center](#) through academic partnerships, internships, and fellowships to share New England's diverse history with today's audiences and expand our engagement with and accessibility for inclusive audiences.
- Tells the stories of 20<sup>th</sup> century life in New England and captures history as it happens in diverse communities through the [Everyone's History](#) initiative.
- [Models and innovates historic preservation practice](#), including work in the field of climate resiliency.
- Convenes a transdisciplinary audience of more than 600 participants from across the region and beyond at the [Historic New England Summit](#) to address urgent challenges and opportunities facing cultural institutions, strengthen our collective network, and pursue solutions for creating more inclusive, sustainable, and livable communities.

Historic New England is governed by a 21-member Board of Trustees and advised by a non-

governing Board of Advisors and a Council. The staff leadership team carries out the organization's mission by managing day-to-day operations and programs.

Our proposed project will produce an institutional Climate Action Plan (CAP) and detailed, ambitious, and actionable project plans for achieving carbon neutrality at two key Historic New England sites: Casey Farm in Saunderstown, Rhode Island, and Pierce House in Dorchester, Massachusetts. Implementation and completion of these project plans will have impacts that reverberate across our organization and the communities that we serve by laying the groundwork for improvements that reduce or eliminate our greenhouse gas emissions, engage our communities, and advance climate justice and energy equity goals.

Adapting to the changing climate is becoming an imperative for all institutions, but as preservationists our challenge is multifold: we must adapt and proactively mitigate climate impacts while still adhering to the principles of our preservation philosophy. By completing the organization-wide Climate Action Plan and developing implementation projects at high-profile, seventeenth- and eighteenth-century historic sites, we will demonstrate to our audiences – including other, likeminded organizations – that preservation and adaptation are not incompatible objectives. To our visitors, members, and historic homeowners throughout the region, we will emphasize the scalability of the activities in our plans and how they may be translated into residential projects. We look forward to interpreting each site's environmental impact from a "full circle" perspective: they were carbon neutral when built and will be carbon neutral again.

### **Strategic Goals and Institutional Commitment**

Since 2004, Historic New England has been building the foundation for a comprehensive climate action strategy. As we experienced a significant uptick in property care emergencies related to severe winds, inundation rains, and localized flooding, we acknowledged that these episodes were worsening as a direct result of our changing climate. We began proactively planning projects and implementing strategies to reduce the risk of climate-related impacts on our properties, focusing first on arbor care, gutters, and site drainage.

Beginning in 2008, we systematically inventoried our trees and woody shrubs and invested in their maintenance, leading to dramatic reductions in dropped limbs and trees. In 2010, we developed white papers for site drainage and began implementing small site improvements as well as holistic site-wide drainage projects that reduced localized flooding episodes. In 2018, with the support of a grant from the Maine Historic Preservation Commission, we analyzed the carrying capacity of eight historic gutter systems in context with historical precipitation data and current data on rainstorm intensity and determined that our gutters are severely undersized and no longer capable of efficiently shedding water away from our historic buildings. This finding has led us to implement both minor adjustments to gutter systems and wholesale replacement of systems at the most problematic sites.

*Society for the Preservation of New England Antiquities d/b/a Historic New England  
NEH Funding Opportunity 20230117-CLI: Climate Smart Humanities Organizations  
Narrative*

While taking these steps to improve our climate resiliency, we also began working to mitigate our carbon footprint. In 2012, we completed a large-scale energy efficiency and weatherization project at the Lyman Estate in Waltham, Massachusetts, that reduced energy usage at the site by 50% and received recognition from the Massachusetts Historical Commission for advancing sustainability goals while adhering to strict preservation standards. Over the past ten years, we have implemented the core findings of that project across our collection of properties, including heating system upgrades and the installation of appropriate storm windows. In 2021, we participated in the New England Museum Association's NEH-supported Culture Over Carbon program and tracked energy use at ten buildings on eight of our historic sites. Using those eight sites as a baseline, we are now identifying benchmark goals for reducing our carbon footprint. We compared our data to the aggressive targets in the City of Boston's Climate Action Plan and found that seven of the ten structures in the study already meet 2035 goals for carbon output – a statistic that inspires us to reach higher for full carbon neutrality.

These individual initiatives had positive impacts on our properties and internal capacity building, but they were implemented without a central vision for institutional climate action. That vision has begun to coalesce over the past two years, and our proposed project will formalize and expand on it. In 2021, Historic New England adopted a [new strategic plan](#) that emphasizes the tenets of inclusion, sustainability, and innovation. In the spring of 2022, we were chosen by the Boston Green Ribbon Commission (GRC) to join a Climate Action Planning cohort of eight cultural institutions. That process began uniting our varied work across the institution, and working collaboratively within our cohort, key Historic New England staff began developing a Climate Action Plan that focuses on resiliency, mitigation, and climate justice. Concurrently, the City of Boston announced that buildings in the city that are larger than 20,000 square feet must achieve carbon neutrality by 2050.

Historic New England's Otis House complex meets that criterion. Following suit, the Commonwealth of Massachusetts announced that all buildings more than 20,000 square feet in the state must begin reporting energy usage data in 2024 and meet additional benchmarks for carbon mitigation. Three more of our sites will be subject to these reporting requirements. While these four sites will soon be required to meet regulatory benchmarks, our goal is to widen the lens and achieve institutional carbon neutrality by 2050 by applying the same standards to our entire collection of thirty-nine properties: thirty-eight historic house museums in five New England states and the Historic New England Center for Preservation and Collections in Haverhill, Massachusetts.

This goal, when presented in November 2022 to the senior leadership team, was met with full and enthusiastic endorsement. The Preservation Committee, our governance group dedicated to the care of the properties, also enthusiastically endorsed the goal. The goal will be presented to the full board of trustees this spring.

The Climate Action Planning process to date, due to staffing constraints and the sheer size of our property collection, has been a generalized approach. We will hire a dedicated staff person to continue developing the Climate Action Plan, adding context and detail encompassing all teams and

all properties. The collaborative CAP process is slated to be complete in June 2023, but with support from NEH, we will expand the document to fully reflect the complexity of our organization. Additional phases of work will allow us to dig deeper and to create site-specific strategic planning documents for achieving carbon neutrality.

### **Project Outline and Methodology**

Our project includes two phases of work dedicated to expanding and completing our Climate Action Plan and the subsequent development of detailed project plans for achieving carbon neutrality at two of our most significant and mission-driven historic sites. The chosen sites, Casey Farm (c. 1750) in Saunderstown, Rhode Island, and Pierce House (1683) in Dorchester, Massachusetts, were selected because they represent vastly different contexts and challenges – one of large acreage in a rural setting and the other a small lot within a dense urban neighborhood. At the conclusion of the project, we expect to have detailed carbon neutrality plans for the two sites, which will allow us to prioritize and then implement capital projects. We also expect that the ideas and strategies generated by this process will be useful at other Historic New England sites and to other stewards of historic properties.

During Phase 1, our Sustainability Coordinator will support efforts to complete our Climate Action Plan, begin institution-wide baselining, and start building towards Phase 2 of the project. The Sustainability Coordinator will lead Historic New England's ongoing participation in the Culture Over Carbon initiative and the Boston Green Ribbon Commission's Climate Action Planning cohort. Through the Green Ribbon Commission process, the Sustainability Coordinator will complete an organization-level plan for carbon mitigation, climate resilience, and climate justice that aligns with the City of Boston's policy goals and regulatory targets. Boston's Climate Action Plan is one of New England's most aggressive and following their benchmarking goals will ensure that our plan aims for the highest possible standards across our entire collection of properties. The Sustainability Coordinator will continue to develop the plan beyond the June 2023 end date of the Green Ribbon Commission process, to ensure it truly represents the entire organization. One of the key elements of the work plan for the Sustainability Coordinator is gathering baseline energy usage information for all thirty-eight museum sites and our eight-story Center for Preservation and Collections.

Phase 2, starting in November 2023, focuses on translating our Climate Action Plan from an institution-wide management document into action by looking in-depth at Pierce House and Casey Farm. Pierce House is a rare seventeenth-century survivor now situated on a half-acre of land in an urban environment. Already an active site for elementary-age education programs, the house is also currently the subject of a two-year project to significantly improve accessibility. The carbon neutrality plan for Pierce House will identify ways to achieve our goals on a small urban scale while still preserving the site's aesthetics and historic fabric. The layering of accessibility improvements and carbon neutrality will make Pierce House a scalable case study for urban property owners and other stewards of historic properties.

Casey Farm presents different challenges and opportunities. This 300-acre property and working organic farm has a robust program of use with museum and historic tours, education programs, a weekly farmers market, and a community supported agricultural program (CSA). The site has no shortage of carbon producing activities, from oil-burning heating plants for the farmhouse and greenhouses, to diesel-fueled tractors and irrigation pumps. But the site is an ideal location for the study and implementation of sustainable practices as it offers space to explore alternative energy sources such as solar, wind, and geothermal while minimizing impacts to the historic integrity of its buildings and landscape. As Historic New England's most visited site, improvements will also be highly visible to the public. We expect that this work will spark conversations with visitors about Historic New England's response to climate change within the context of the farm's long-term preservation and ongoing agricultural traditions.

Our partner on the carbon neutrality plans will be GreenerU, a Waltham, Massachusetts, consulting firm with deep experience working with institutions to decarbonize their buildings and campuses. To meet our mitigation, resiliency, and climate justice goals, we expect a comprehensive process that will include stakeholder outreach and convenings, strategic planning sessions, and the creation of an actionable plan with prioritized recommendations for capital projects. The plan will also explore the possibility of advancing climate justice goals through opportunities like community solar at Casey Farm. Using these recommendations, we will develop a scope of work for demonstration projects at Casey Farm and Pierce House that will reduce or eliminate each site's dependence on fossil fuels, proactively decrease carbon emissions, and prepare the sites for weather extremes while maintaining historic integrity and the visitor experience.

### **Work Plan and Budget**

The project is divided into two phases. The first phase is from January 2023 through October 2023 and the second phase is November 2023 through December 2024. During Phase 1, Historic New England's Sustainability Coordinator will work with our core project team (identified and described in the Project and Fundraising Teams section below) on several different initiatives. The core of the work is participation in the Boston Green Ribbon Commission's Climate Action Planning cohort. The cohort meets monthly with additional open hours in between sessions to meet with the technical advisors. From January through June 2023, we will complete a draft of our institutional Climate Action Plan. This process will also include multiple points of engagement with staff throughout the organization. In January, we will conduct a series of brainstorming sessions to engage staff from all teams in ideation exercises.

Because of the complexity of our property holdings and operations, we expect baselining to start in January 2023 and continue beyond the June 2023 date established as part of the cohort CAP process. The Sustainability Coordinator will begin by reviewing utility analysis software packages to make analysis of our energy usage and carbon footprint more accessible. Our technical advisor, GreenerU, has provided us with three different software programs to review. Concurrently, the Sustainability Coordinator will begin collecting utility data for all our sites. Resiliency baselining will

also be incorporated through the completion of risk assessments for all properties based on climate change related weather extremes. The Sustainability Coordinator will work with staff throughout the organization to develop this data. They will also research and compile resiliency strategies being utilized or recommended by preservation organizations around the world so that we can build a reference library of options. Finally, our work with staff across the organization will extend beyond the brainstorming sessions in January to include regular check-ins and ideation sessions. We expect the Sustainability Coordinator to continue meeting with individual teams during the two-year process to advance targeted discussions and generate additional ideas for mitigating our reliance on petroleum-based products and leveraging our sites for climate justice.

Starting in May 2023, the Sustainability Coordinator will work with GreenerU to complete a comprehensive energy audit and site sustainability assessment (the “baseline”) for all operations at Casey Farm. Our goal is to complete this baselining by September 2023 and begin to close out Phase 1 of the project.

Phase 2, starting in November 2023, is the proposed NEH-funded project and focuses on translating our CAP from an institution-wide management document into two site-specific implementation plans. By studying two properties, we hope to explore a wide variety of options that we feel comfortable deploying in the context of our own preservation approach, that will benefit the greater public, and will enable us to develop a framework for continuing this work with our other thirty-six museum sites.

The Casey Farm carbon neutrality plan will be developed from November 2023 through March 2024. Working with GreenerU, our project team expects to develop specific goals, strategies, and actions for complete sustainability at the farm. The planning process includes meeting with the Casey Farm operations staff, including the site managers, farm managers, and longtime farm support staff, the head of education at Casey Farm, and key long-term educators. We also expect to engage key members of the community, including representatives of local government, farmers market vendors, members of our community supported agricultural program, educators, social service providers, and others. GreenerU will then work with the project team to review stakeholder input and feedback, write and design the plan, and create an implementation work plan with cost estimates.

In spring 2024, we will begin the Pierce House component of the project. GreenerU will work with our Sustainability Coordinator to develop the baseline and then follow a more streamlined planning process, as the site is significantly less complex and has fewer internal and external stakeholders than Casey Farm. There will be a public component to solicit input from community members and site users. GreenerU will then develop an implementation plan including site assessment, recommendations, and specific action items for achieving carbon neutrality. The goal is to have this component complete by October 2024, so that we may use the last two months of the project period to work on final deliverables and disseminating reports.

Award funds will be spent strictly in Phase 2 on two project components: consultant costs for Pierce House planning (\$25,161) and associated Historic New England staff time (approximately 386 hours; \$22,868).

### **Fundraising Plan**

Historic New England's financial sustainability is strong, having weathered the pandemic without any lasting negative impacts to our fiscal health. We maintain a broad base of support from 8,233 member households in 44 states, 6,749 individual and institutional donors, and more than 200,000 annual visitors. In FY2022, our top sources of revenue were investment return (\$6 million), individual gifts and grants (\$3.5 million), government grants (\$2.5 million), rental income (\$1.1 million), and program and admissions revenue (\$556,000).

In recent years, Historic New England has been diligently pursuing funding to address climate action planning and resiliency projects. Our success in this area includes raising more than \$600,000 from the Massachusetts Department of Energy Resources and other funders for a large-scale weatherization and energy efficiency project at the Lyman Estate in Waltham, Massachusetts, and obtaining \$163,500 from the van Beuren Charitable Fund for resiliency improvements at Watson Farm in Jamestown, Rhode Island.

Our work to date attracted the interest of the 1772 Foundation, which awarded us \$200,000 in November 2022 to fund Phase I and Phase II expenses of this project as identified in our budget justification. Thanks to this recent award, all matching funds to complete the project are secured.

### **Project and Fundraising Teams**

Making our properties more resilient and energy efficient is not a new priority for Historic New England and, as described above, we have been steadily building capacity in this area for the past decade. As we begin to take a more holistic look at our collection of sites and our operations, we are ensuring additional capacity for success by hiring a dedicated Sustainability Coordinator and working closely with partner consultants.

The Sustainability Coordinator manages the organization's effort to complete our Climate Action Plan and to develop a scope of work for achieving carbon neutrality at two of our thirty-eight historic sites. The Sustainability Coordinator is supported by GreenerU, a Waltham, Massachusetts, consulting firm dedicated to helping institutions achieve climate neutrality and sustainable operations.

GreenerU provides Historic New England with technical support for the Green Ribbon Commission's collaborative Climate Action Planning process and staff have benefited from their expertise in this format. Their contribution to this project will be both technical and facilitatory. They will complete a comprehensive energy audit and site sustainability assessment (the baseline) for both Casey Farm



and Pierce House. This assessment will go far beyond the typical parameters of a single-building energy audit to include review and analysis of site-wide greenhouse gas emissions, water efficiency and wastewater management, indoor air quality, and community engagement and programming. Upon completion of each assessment, GreenerU will facilitate the development of a detailed plan for achieving carbon neutrality. The Sustainability Coordinator will lead Historic New England's participation in this process, which will include stakeholder outreach and convenings, strategic planning sessions, and the creation of an actionable plan with prioritized recommendations for capital projects at each site. At the conclusion of the process, the Sustainability Coordinator will also produce a framework for analysis and sustainability planning that can be applied to other Historic New England sites, another critical step toward increasing our overall institutional capacity to pursue carbon neutrality.

The core **internal** team will be made up of three staff members:

Benjamin Haavik, Team Leader Property Care. Role: Project Director. Mr. Haavik has been in this position since 2004 and has overseen the development of the Climate Action Plan to date. Mr. Haavik has a master's degree in historic preservation from the University of Pennsylvania and is a Professional Associate of the American Institute for Conservation (AIC). Recently Mr. Haavik was sought out to peer review an article on climate action planning for collections storage by the *Journal of the American Institute for Conservation*. During his eighteen years at Historic New England, Mr. Haavik introduced a system for strategic prioritization and management of Historic New England's properties, spearheaded system-wide initiatives to understand their environmental systems, developed a weatherization and energy efficiency framework, established best practices for house museum security, and is currently engaged in an effort to make Historic New England's sites accessible. He will be involved in guiding the project, providing feedback, ensuring the project meets institutional and preservation standards, reviewing deliverables, and supporting fundraising.

Marissa Mayo, Property Care Operations Manager. Role: Project Manager. As operations manager, Ms. Mayo is engaged in nearly all aspects of planning for our properties, and as the primary contact for the Culture Over Carbon program, has gathered energy usage data for our collection of sites. She will supervise the work of the Sustainability Coordinator and ensure overall consistency of approach.

Sustainability Coordinator. Role: Project Coordinator. The Sustainability Coordinator is envisioned to be an emerging professional in the planning, environmental science, or preservation field, with knowledge of environmental and climate related issues and a demonstrated interest in a sustainability-focused career path. This position will be filled in January 2023. The Sustainability Coordinator will play an active role in the day-to-day work of all phases of the project.

Additional staff members contributing to the project include:

Katherine Pomplun, Institutional Giving Officer. Role: Fundraising. Ms. Pomplun researches and develops grants to support the activities of the property care team. Ms. Pomplun ensures all obligations to the funders, including program compliance, reporting, and press, are fulfilled.

Peter Gittleman, Team Leader Visitor Experience. Role: Project Team Member. Mr. Gittleman manages all operations and visitor interactions at the historic sites including administration, tours, programs, events, education, and function rentals.

Elizabeth Paliga, Preservation Services Manager. Role: Project Team Member. Ms. Paliga's experience working with our communities and historic homeowners across the region will inform our outreach to external project stakeholders.

The core **external** team will include experienced professionals from GreenerU, the project's lead consultant. Primary among these are:

Chris Lewis, Vice President of Engineering. Role: Technical Support. Mr. Lewis has a master's degree in engineering management from Tufts University and more than fifteen years of varied experience in the energy efficiency arena. At GreenerU, he focuses on the development and implementation of energy efficiency capital projects. Mr. Lewis will lead baselining activities and assist with navigating the technical challenges involved with site-wide decarbonization.

Jennifer Haugh, Director of Planning and Customer Engagement. Role: Planning, Writing, and Design. Ms. Haugh has a master's in public administration from Harvard Kennedy School and master of design from Harvard Graduate School of Design. She will facilitate our strategic planning sessions for each site, engage internal and external stakeholders, and develop and design the deliverable carbon neutrality plans for Casey Farm and Pierce House.

### **Deliverables, Dissemination, and Next Steps**

The project will produce three primary deliverables: an institutional Climate Action Plan for Historic New England, a Carbon Neutrality Plan for Casey Farm, and a Carbon Neutrality Plan for Pierce House. The institutional Climate Action Plan will articulate and formalize Historic New England's commitment to achieving organization-wide carbon neutrality by 2050. The carbon neutrality plans will include sustainability and baseline assessments, recommended scopes of work, and cost estimates for implementation. Historic New England expects sufficiently detailed documents that can be shared with the broader public and translated into a fundraising campaign focused on climate action.

Additional deliverables to be produced by the Sustainability Coordinator include an internal carbon neutrality planning framework that may be applied to other Historic New England sites, and dissemination of project findings at the Historic New England Summit in fall 2023 and 2024.

Historic New England is the country's largest regional heritage organization and a leader in preservation practices. We conduct and share our research and experiences widely with professionals, historic site stewards, and the public. Recent [white papers](#), all available free of charge on the organization's website, include guidance on climate change, environmental conditions, security, and energy efficiency with case studies in accessibility soon to be published.

*Society for the Preservation of New England Antiquities d/b/a Historic New England  
NEH Funding Opportunity 20230117-CLI: Climate Smart Humanities Organizations  
Narrative*

Historic New England has already begun sharing its approaches to resiliency and energy efficiency widely and we will continue to leverage our professional relationships and network to elevate the topic of climate action planning within the museum sector. We will disseminate the results of this project as broadly as possible. We expect to continue to leverage and share findings locally, regionally, and nationally at conferences and meetings for entities ranging in size and scope from single house museums to large professional membership organizations. Our historic homeowner program, which lectures frequently on weatherization and mitigation based on the work we have completed to date, is eager for more data and examples with which to discuss the topic. In 2022, Historic New England launched the Historic New England Summit, a two-day, multi-disciplinary conference focused on urgent topics affecting cultural resources and organizations. Sustainability was a major focus in year one, and we expect it to remain a prominent feature of the program as we continue to present this regional annual conference. The Summit will provide an additional forum for us to discuss this project and its results. The next Historic New England Summit will be held November 2-3 in Providence, Rhode Island.





**Historic New England  
Institutional Profile**

URL: [www.historicnewengland.org](http://www.historicnewengland.org)

FY22 Annual Report: <https://report.historicnewengland.org/>

**1. Facts and Statistics**

**a. History**

Historic New England, founded as The Society for the Preservation of New England Antiquities in 1910, is the largest and most comprehensive independent preservation organization in the United States, and welcomes the public to thirty-eight exceptional museums and landscapes, including several coastal farms. Historic New England is the only organization committed to protecting and sharing the full New England experience, with more than 110 years of pioneering public engagement and preservation practice across the region. The organization operates a major collections and archives center in Haverhill, Massachusetts, and has the world's largest collection of New England artifacts, comprising more than 123,000 decorative arts and objects, and 1.5 million archival documents including photographs, architectural drawings, manuscripts, and ephemera. Engaging education programs for youth, adults, and preservation professionals, and award-winning exhibitions and publications are offered in person and virtually. The Historic New England Preservation Easement program is a national leader and protects 118 privately owned historic properties throughout the region.

**b. Mission**

We save and share New England's past to engage and inform present and future generations.

**c. Governance and administration**

Historic New England is governed by a 21-member Board of Trustees and advised by a non-governing Board of Advisors and a Council. The staff leadership team carries out the organization's mission by managing day-to-day operations and programs.

**d. Physical Facilities**

Historic New England owns, protects, and interprets thirty-eight historic house museums spanning four centuries of architectural styles and five New England states. The organization also owns the Lang Building, an 8-story former shoe factory in Haverhill, Massachusetts, that is home to the Historic New England Center for Preservation and Collections. Historic New England takes care of 160 buildings with 2,903 windows, 147 chimneys, 67 heating systems, and 284,228 square feet of roofs.

**e. Humanities staff size and composition**

Historic New England's humanities staff includes 67 year-round FTE and 66 seasonal FTE on the Collections, Property Care, and Visitor Experience Teams. Our staff includes curators, conservators, archivists, preservation managers, technicians, historic site managers, museum educators, museum guides, and research scholars at the Historic New England Study Center. In addition to staff, 370 volunteers dedicate more than 5,000 hours of their time to our sites, farms, landscapes, collections, and archives.

**f. Humanities collections**

With more than 125,000 objects and 1.5 million archival materials, Historic New England's collection tells the most complete story of how New Englanders lived from the seventeenth

century to today. Half of the object collections are on view at our historic sites, and hundreds of thousands of items, including photographs, wallpaper, jewelry, home furnishings, architectural drawings, and clothing have been digitized for browsing and searching.

**g. Accreditation or affiliation**

Historic New England is accredited by the American Association of Museums. Organizational membership affiliations include the New England Museum Association, the National Preservation Partners Network, and the National Trust for Historic Preservation's Preservation Leadership Forum.

**2. Data on Recent Humanities Activities**

**a. Types and numbers of enrollments, programs, exhibitions, courses, and degrees awarded in the past two years**

In the past two years, Historic New England has offered twenty-eight permanent on-site exhibitions, six permanent digital exhibitions, and two temporary exhibitions. Our education program has offered more than 50 different school programs and served over 56,000 students through on-site, virtual, and in-classroom offerings. In 2021, we launched *Recovering New England's Voices*, a multi-year initiative employing multiple full-time research scholars to transform the stories we tell at our sites, recognize historically marginalized communities, and create a more complete record of all the region's stories. In 2022, we launched the inaugural Historic New England Summit: a two-day, multi-disciplinary conference focused on urgent topics affecting cultural resources and organizations.

**b. Percentage of total offerings that are in the humanities**

100% of Historic New England's programming, including exhibitions, youth education programs, and peer-to-peer outreach, is humanities-based.

**c. Size and nature of audience population served, including annual visitor numbers and the metrics used to determine them**

In 2022, we welcomed 167,657 visitors for house tours, public programs, school groups, functions, on-site exhibitions, community meetings and landscape use. An additional 19,777 schoolchildren were served through off-site education outreach. Our digitized collections were accessed on our website more than 650,000 times. Attendance data is tracked through ticket sales, attendance logs, and program registrations.

**d. Cost to participants**

Admission to our historic sites ranges from \$10-\$25. Free admission to all sites is included with all Historic New England membership levels. Annual membership begins at \$25. Many education programs are subsidized to eliminate barriers to attendance for on-site education programs.

**e. Evidence for success of these humanities activities**

Our success is evidenced by significant, sustained growth in membership and program attendance, and through the recognition and support of key national, state, and local funders. In 2022, membership increased by 9% to exceed 8,000 households. Our inaugural Historic New England Summit attracted more than 600 participants in its very first year, attesting to our organization's leadership and value to area cultural institutions. Grants supporting our humanities mission have been recently awarded by funders including the Massachusetts Foundation for the Humanities, Massachusetts Cultural Council, and the National Trust for Historic Preservation, among others.

## BENJAMIN K. HAAVIK

Team Leader, Property Care, Historic New England

(b) (6); [bhaavik@historicnewengland.org](mailto:bhaavik@historicnewengland.org); (b) (6)

### PROFESSIONAL QUALIFICATIONS

#### **Historic New England**, Boston, MA

- *Team Leader, Property Care* (August 2004 to Present); Responsible for the preservation and maintenance of the 37 historic house museums and landscapes in the Historic New England collection. Oversees all project planning and implementation and has spearheaded many different initiatives including a comprehensive property assessment process, long term planning, energy efficiency, environmental system management, climate change and ongoing work to standardize and document the preservation and architectural conservation approaches used at the organization in the form of white papers available on the website.

#### **Historic House Trust of New York City, Inc.**, New York, NY

- *Deputy Director* (June 2001 to June 2004); *Acting Executive Director* (April 2002 to May 2002); *Property Manager/GIS Coordinator* (January 2001 to June 2001)

#### **Fairmount Park Historic Preservation Trust, Inc.**, Philadelphia, PA

#### **The Fairmount Park Commission**, Philadelphia, PA

- *GIS Coordinator/Historic Preservation Consultant* (June 2000 to January 2001); *GIS Coordinator/GPS Surveyor*, Fairmount Park Cultural Resource Inventory Phases I & II (October 1998 to June 2000); *Administrative Assistant, Fairmount Park Historic Preservation Trust* (May 1998 to October 1998)

### SELECTED PRESENTATIONS, REPORTS AND PUBLICATIONS

- *Climate Change and Gutters*, Presentation at the AIC 47<sup>th</sup> Annual Meeting (2019)
- *Weather Related Events and Historic House Museums; A Ten Year review of Emergency Preparedness and Response at Historic New England*, Presentation at the AIC 44<sup>th</sup> Annual Meeting (2016)
- *How to Salvage your Historic House Museum after a Car Crash: The Marrett House Emergency Preservation and Conservation Project*, Benjamin Haavik and Alexander M. Carlisle, Presentation at the AIC 43<sup>rd</sup> Annual Meeting (2015)
- *Turning Philosophy into Practice: Documenting Process Through White Papers*, Presentation at the Opening Session at the AIC 43<sup>rd</sup> Annual Meeting (2015)
- *Establishing standards for architectural paint research at Historic New England*, Presented at and published proceedings from the 5<sup>th</sup> International Architectural Paint Research Conference (2014)
- *Collaboration and Preservation: Historic New England and the Proactive Preservation Interpretation and Planning (PIIP) Process*, co-authors Benjamin Haavik, Carl R. Nold, Julie A. Solz; presented at and proceedings from *The Artifact, Its Context and Their Narrative: Multidisciplinary Conservation in Historic House Museums*, ICOM-CC and DEMHIST (2014)
- *Preservation Challenges of the Gropius House*, Presented at *Private Domains/Public Displays: The Modern House Interpreted, A Symposium in Celebration of Fallingwater's 75th Anniversary* (2011)
- *Revisiting Reality: A Changing Approach to Environmental Control in Historic House Museums at Historic New England*, Benjamin Haavik and John Childs, Presented at the AIC 38<sup>th</sup> Annual Meeting (2010)
- *Restoration Decisions: A Case Study of the Arnold House*, Presented at the AIC 35<sup>th</sup> Annual Meeting (2007)
- *Technology for Cultural Resource Management*, Presentation at the AIC 30<sup>th</sup> Annual Meeting (2002)
- *Technology for Cultural Resource Management: The Historic House Trust Information System*, Journal of the American Institute for Conservation; (Spring 2003, Volume 42, Number 1)

### EDUCATION

- Attingham Summer School program (July 2004)
- MS in Historic Preservation, University of Pennsylvania, Philadelphia, PA. (1998)
- BA in History, Haverford College, Haverford, PA. (1995)



# Marissa L. Mayo

Academic Alias: Marissa L. DeMello

## Contact Details

(b) (6)

Email: (b) (6)

Home: (b) (6)

## Education

- 2013 Ph.D. Archaeology (*unfinished*), “Barbarians and Scholars”, University of Durham, Durham UK
- 2013 M.Sc., Paleopathology, University of Durham, Durham UK, GPA 3.43, *Merit*
- 2011 B.A., History, 2011, Ithaca College, Ithaca, New York, GPA 3.65, *Cum laude*  
Minor: Classical Studies
- 2011 B.A., Anthropology, 2011, Ithaca College, Ithaca, New York, GPA 3.77, *Magna cum laude*

## Employment History

08/2021-Present **Property Care Operations Manager**, Historic New England, Waltham MA, USA

The role had the initial responsibilities of management of all security systems across 38 sites in 5 states, create and manage a key hierarchy for over 2,500 active keys, take control of fleet management, onboarding and offboarding new staff, working with the preservation carpenters and collections staff on operations projects, pest control, utilities maintenance, handle all tenant queries and repairs, and balance the security budget annually. After 10 months, I successfully completed a companywide key audit, 4 security projects, and updated all fleet for a successful rotational replacement and repair system. With the departure of a few staff, I was given the additionally responsibilities of project manager for 14 sites, and the grant writer and/or editor for said projects.

03/2020-08/2021 **Store Director**, Event Network, Boston MA, USA

In this role, I managed the JFK Museum and library gift shop, and acted as a liaison between the JFK Foundation, the JFK Museum, and Event Network. This role requires great communication and organizational skills; This combined with years of customer service allowed for me to excel in this role and help manage two locations (JFK Museum and the Boston Children’s Museum), while supporting three other locations (New England Aquarium, Museum of Science, and the U.S.S. Constitution).

02/2008-01/2020 **Store Manager**, Starbucks, Wellesley MA, USA

This work includes, but is not limited to: hiring, scheduling, coaching, training, cash management, inventory counts, store supplies and food orders, corrective action/counselling, interviewing, creating beverages, maintaining low drive-thru times while having high customer satisfaction, developing the “third place” within my location.

11/2014-05/2019 **Catalog/Database Assistant (Volunteer)**, Boston City Archeology Program, Boston, MA, USA

I am helped to update the MATS, (Massachusetts Artifact Tracking System), by entering the past two years’ worth of collections’ data, and also confirming proper labeling and accessing to the City Archaeologist’s standards.

02/2015- 02/2018 **Manager**, Teavana, Hyannis MA, USA

I was the individual responsible for the successful running of the Cape Cod Teavana location. This required me to complete transactions, maintain number one status in productivity, meet daily store sales goals, stock merchandise, replenish samples, verify handle deposits, complete scheduling, payroll, and other paperwork, send reports, and order supplies, hire and train new employees, all while guiding my current employees and maintaining great relationships with them and our customers. I was hired as a Team Lead but was promoted to Assistant Manager 5 months after employment and to Manager 6 months later.

10/2013-09/2014 **Wine Associate**, Total Wine and More, Sarasota, FL, USA

I was responsible for maintaining and improving wine sales, providing knowledge on over 8,000 different wines and their various wine styles and regions, and creating a daily inventory for stocking purposes. I was also in charge of the lock box: wines that range from \$100 to \$5000.

04/2012-01/2013 **Vintage/Repair Sales Consultant**, Ding Dong Vintage, Durham, UK

I cleaned, repaired and sold vintage clothing from the Victorian era to the 1960's, specializing on 1940's women's clothing, restoration of furs, and Victorian jewelry.

01/2011-05/2011 **Artifact Sketch Artist**, Ithaca College, Ithaca NY, USA

Sketched fragmented pipe bowls for publication for the archaeologist Jack Rossen's reports on Native American sites in upstate New York.

10/2010-05/2011 **Research Assistant**, Anthropology Department, Ithaca NY, US

Researched paleopathological articles relating to the osteological data, transcribed an ex-slave narrative, and organized photographs of the paleopathological data from Professor Jennifer L. Muller's research on the "Newburg Colored Cemetery" in Newburg, New York.

09/2008- 05/2009 **Picture & File Curator**, Anthropology Department, Ithaca NY, USA

Scanned, edited, and distributed copied discs of archaeological photographs from the personal collections of the Anthropology department professors to be used in class lectures.

05/2007- 08/2011 **Horticulturist/Interim Director of Horticulture**, Heritage Museums and Gardens, Sandwich MA, USA

A seasonal position where I assisted in designing, pruning, weeding, planting, and overall maintenance of the 100 acres of gardens at the museum, while working with other departments on developing and installing new programs and exhibits, such as Hidden Hollow. While I was the Interim Director, I organized the Fall planting schedule, directed outsourced work crews, and completed the BG Map/BG Base database work.

## **Research**

2013 "Barbarians & Scholars: An Osteological Analysis of Phenotypic Traits of Germanic Peoples", Research at Durham University, UK

*Description:* A comparison of the descriptions of the Germanic peoples of Tacitus to the phenotypic traits observed in osteological remains to see what the proper use of Tacitus' works would be: socio-political commentary or factual, chronological history.

*Researcher:* **Marissa DeMello**

2013 "Answering the Historical Paradox of Literature Analysis through Osteological Material", M.Sc. Dissertation at University of Durham, UK

*Description:* A theory paper on how the "historical paradox", as explicated through the hermeneutic circle in historic literature, can be reconciled with osteological material as it offers a rationalist perspective through the data.

*Researcher:* **Marissa DeMello**

2010 "Colonial Women and Death: An Analysis of the Age at Death in Early Colonial American Culture"; Ithaca College, New York, USA

*Description:* A demographic analysis of the "Old Burying" Cemetery in Sandwich, Massachusetts, ranging from 1683 to 1773, specifically looking at the age at death in women as a valuable commodity versus the affect of harsh colonization period.

*Researcher:* **Marissa DeMello**

2009 "Skeletal Trends: A comparison between the Albany Almshouse and the Oneida Asylum"; Ithaca College, New York, USA

*Description:* An osteological comparison of a sample of 4 individuals from the Oneida Prison/Asylum and Albany Almshouse with permission from the New York State Museum

*Researchers:* Margaret (PJ) Mead, **Marissa DeMello**, Emily Zepp, Juli Menaissan

## **Presentations**

2013 April 4<sup>th</sup>-6<sup>th</sup> **Theoretical Roman Archaeology Conference (TRAC)**, "Barbarians & Scholars: An Osteological Analysis of Phenotypic Traits of Germanic Peoples from the Munich Museum", London, UK, **Marissa DeMello**

*Description:* Poster Presentation on the collected data from the Munich Museum osteological material in relation to the phenotypic descriptions of Tacitus.

2012 March 10<sup>th</sup> **"The Future of the Past: Innovative Techniques, Methods and Ideas in Bioarchaeology" Conference**, "Poison or Plague: Differential Diagnosis of the Plague at Athens during the Post-Peloponnesian War", Durham University, UK, **Marissa DeMello**

*Description:* Poster Presentation on the three possible identifications of the plague, with the conclusion that typhus combined with ergotism best explains the plague.

2011 April 35<sup>th</sup> **Annual Paleopathology Association Meetings**, "Colonial Women and Death: An Analysis on the Age at Death in Early Colonial American Culture"; Minneapolis, Minnesota, USA, **Marissa DeMello**

*Description:* Poster Presentation on the age at death for both men and women of colonial Sandwich MA, based on historic accounts and tombstones. No *statistically* significant difference were determined between the sexes.

2010 Nov 5<sup>th</sup> **Teach For America**, “Forensic Anthropology” Lecture Assistant Groton High School, 11<sup>th</sup> and 12<sup>th</sup> Grade Forensic Science Seminars

*Description:* Assisted in Prof Jennifer L Muller with osteological materials

*Assistants:* Michael O’Brien, **Marissa DeMello**

2010 April 8<sup>th</sup> **Whalen Academic Symposium**, “Paleopathological analysis of Skeletal Remains from the New York State Museum”, Ithaca, New York, USA, Margaret (PJ)

Mead, **Marissa DeMello**, Emily Zepp, Juli Menassian

*Description:* Poster presentation at Ithaca College on research conducted in 2009 on the Oneida/Albany population

### **Awards and Grants**

- 2013 St. Aidan’s College Grant  
190 GBP towards presenting at a conference
- 2013 TRAC Bursary Award  
50GBP towards presenting at a conference
- 2013 Merit, Durham University  
Graduate with 60-69 average (equivalent to a 3.5-3.7 GPA)
- 2011 C.P. Snow Scholar Award  
A \$500 gift is presented to one each year “who have fulfilled C.P. Snow’s vision in their schoolwork and extracurricular activities” by finding a way to bridge the gap between the “two cultures” of the sciences and the humanities.
- 2011 Cum Magna Laude, Ithaca College  
Graduate with a GPA 3.7 or higher
- 2010 Phi Alpha Theta, National History Honors Society  
GPA in History of 3.5 or higher
- 2010 Lambda Alpha, National Anthropology Honors Society  
GPA in Anthropology of 3.5 or higher
- 2010 Robke-Zuris Scholarship  
For outstanding Academic Achievement
- 2009 Robke-Zuris Scholarship  
For outstanding Academic Achievement
- 2008 Oracle Society  
Top 10% of the graduating class
- 2008 Dean’s List  
Overall GPA of 3.5 or higher, Spring & Fall
- 2007 Flora Brown Award  
For Academic Achievement
- 2007 Dean’s List  
Overall GPA of 3.5 or higher, Fall

### **Professional and Student Memberships**

- 2011- present The Paleopathology Association  
Student Member
- 2011- present Phi Alpha Theta

	National History Honor Society
2011- present	Lambda Alpha National Anthropology Honor Society
2009- 2011	Anthropology Club Member
2009- 2010	Anthropology Club, Ithaca College President
2008	Crime Scene Investigation: Ithaca, Ithaca College Creator and President

### **Skills**

- Plan and execute activities and events
- BG Map, BG Base: A GPS system used to map out areas via satellite which then adds the maps to a worldwide database
- Landscape Architect II
- Lecture and teaching experience
- Archaeological and biological methods
- Spanish, French, Classical Latin, Homeric Greek, Chaucerian English proficiency
- Microsoft Access proficiency
- Office, Excel, PowerPoint
- SPSS proficiency
- Paleopathological and trauma analysis
- Biological Profiling: Stature, Age, Sex, Ancestry
- Search and Recovery, forensic investigation
- Slide Scanning and Picture/File editing
- Grant Writing, Fundraising



**HISTORIC  
NEW ENGLAND**

*Defining the past. Shaping the future.*

## **JOB DESCRIPTION**

<b>JOB TITLE:</b>	<b>Sustainability Coordinator</b>	<b>Date:</b>	<b>Nov. 2, 2022</b>
<b>TEAM:</b>	<b>Property Care</b>		
<b>REPORTS TO:</b>	<b>Operations Manager, Property Care</b>	<b>Hours:</b>	<b>40 per week</b>
<b>CLASSIFICATION:</b>	<b>Term-Limited/Regular Full Time/ Exempt</b>		

### **PRIMARY FUNCTION:**

As the Sustainability Coordinator, you will help define Historic New England's approach to sustainability by taking a lead role in the development of a Climate Action Plan for the institution, gathering and maintaining base-lining information, and developing or implementing initiatives designed to advance our progress on carbon mitigation, climate resilience, and climate justice through a historic preservation lens. The ideal candidate will be an emerging professional in the planning, environmental science, or preservation field, with knowledge of environmental and climate related issues and a demonstrated interest in a sustainability-focused career path.

The Sustainability Coordinator is a term-limited, two-year position. During this term you will work closely with Historic New England staff and will receive technical support, initially through participation in the Boston Green Ribbon Commission's Climate Action Planning cohort. As part of this project, the Sustainability Coordinator will also work with outside consultants to plan a carbon mitigation demonstration project at Casey Farm in Saunderstown, RI. This test project will provide the intellectual framework for planning at our other properties. Additional planning or projects are expected to be developed and possibly implemented during the course of the two-year term.

### **PRIMARY RESPONSIBILITIES:**

- Gather, develop, maintain, and analyze the baseline data as required to support Climate Action Planning for all Historic New England properties, and report to regulatory entities as required.
- Take a leading role in Historic New England's participation in the Climate Action Planning cohort and writing the Climate Action Plan.
- Coordinate external and internal partners in developing the Casey Farm carbon neutrality plan and lead the process.
- Develop a framework for approaching carbon neutrality at other Historic New England sites and begin implementing aspects as funding or planning allows.
- Write case studies and articles, present the work in public forums, and use social media to promote the work. Develop funding packages as required.

**SUPERVISORY RESPONSIBILITY:**

None

**QUALIFICATIONS:**

**Minimum Qualifications:**

Enthusiasm for the topic and a desire to make this project a stepping stone for your professional career.

A degree in the planning, environmental science, or preservation field, with knowledge of environmental and climate related issues and a demonstrated interest in a sustainability-focused career path

Working knowledge of word processing, e-mail, internet research, spreadsheets, digital photography and project management software.

Ability to operate effectively in a team environment, where communication within and among the teams is essential to success. The ability to interact and communicate orally and in writing is essential.

Problem solving skills and ability to effectively plan and implement work processes to complete tasks according to schedule.

A valid driver’s license and a means of transportation.

New England based residency is required.

Verification of full COVID-19 vaccination status or exemption approved by Historic New England prior to the start date of employment.

Commitment to the values of diversity, equity, accessibility, and inclusion.

**Other Preferred Qualifications:**

- Previous experience with both sustainability issues and historic preservation

**WORK ENVIRONMENT:**

This is a salaried exempt position with an ideal commitment of 40 hours per week, typically eight-hour days, plus a thirty-minute state regulated unpaid meal break. This position may be based at a Historic New England Regional Office or fully remote-based, with travel to Historic New England properties required. Weekend and evening work periodically required through planned activities.

As typically performed, this position regularly involves talking, hearing, sitting, standing, walking, and bending/stooping. The position also involves lifting up to 50 pounds. The employee must apply manual dexterity in combination with eye-hand coordination such as basic keyboarding, operation of basic hand tools, and/or handling of objects. The employee in this position is exposed to weather extremes. The visual demands of the position require regularly reading documents for general understanding. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions of the position.

Accepted and Approved:

\_\_\_\_\_  
Employee

\_\_\_\_\_  
Date

\_\_\_\_\_  
Supervisor

\_\_\_\_\_  
Date

---

President

---

Date

FINAL 12/2022 vc



# TEAM RESUMES



## JENNIFER HAUGH

### PROJECT EXECUTIVE



### EDUCATION

Harvard Graduate School of Design: Master in Design Studies

Harvard Kennedy School: Master in Public Administration

University of New Haven: graduate certificate in forensic genetic genealogy (expected)

University of Minnesota: Bachelor of Individual Studies

### PROFESSIONAL AFFILIATIONS

Senior Fellow, Environmental Leadership Program

Fellow, Rappaport Institute for Public Policy

With 25 years of professional experience in the nonprofit and public sectors, Director of Planning and Customer Engagement Jennifer Haugh came to GreenerU in April 2017 with a broad scope of expertise, including in communications, fundraising, and leadership.

Her varied background includes serving as a legislative aide for a U.S. Congressman, as a grassroots advocacy organizer for Walker Art Center and Minnesota Citizens for the Arts, and as marketing and development director for Minnesota Youth Symphonies. She also led media relations and corporate communications for American Public Media. In 2009, she founded Haugh Communications, a full-service writing and editing shop for students and professionals.

Jen is a Rappaport Institute policy fellow and worked for the Massachusetts Department of Energy Resources on energy-efficiency programs for commonwealth-owned facilities. She is also a senior fellow with Environmental Leadership Program.

At GreenerU, Jen leads the planning team and planning processes, and is also responsible for the company's marketing efforts, business development support, company strategy, and operational planning and implementation efforts of GreenerU's internal strategic plan.

### KEY PROJECTS

GreenerU, Inc., Waltham, MA  
Strategic plan development, design, and implementation

University of Rochester, Rochester, NY  
Sustainability and climate action planning

UMass Chan Medical School, Worcester, MA  
Climate action plan design; decarbonization plan facilitation

Coffee House Press, Minneapolis, MN  
Strategic plan management

Lower Cane Run Wet-Weather Storage Facility, Lexington, KY  
Facilitation for landscaping a public bike path stop

University of Central Florida, Orlando, FL  
Climate action plan writing

Portland Community College, Portland, OR  
Plan design

Concord Free Public Library, Concord, MA  
Plan design

# TEAM RESUMES



**CHRIS LEWIS, CEM**

**TECHNICAL SUPPORT**



## **EDUCATION**

Tufts University: Masters of Science in Engineering Management

Union College: Bachelor of Science in Mechanical Engineering

## **CERTIFICATIONS**

Certified Energy Manager (CEM)

## **PROFESSIONAL AFFILIATIONS**

ASHRAE, Boston Chapter  
AEE New England

GreenerU's Vice President of Engineering Chris Lewis has more than fifteen years of varied experience in the energy efficiency arena. Prior to joining GreenerU, he gained experience in the energy services industry, specializing in projects for higher education and municipal customers. This experience was gained working with a major energy services company (ESCO) managing the implementation of energy efficiency projects.

Since joining GreenerU in 2012, Chris has worked on developing and implementing energy efficiency projects and programs at client campuses, covering a wide range of efficiency measures and capital projects. These projects provide customers with energy efficiency and infrastructure upgrades, delivering cost savings and improved systems reliability. Chris leads client engagement for project development and also provides technical guidance for GreenerU's climate action planning process, helping clients navigate the technical challenges involved with campus decarbonization.

## **KEY PROJECTS**

Smith College, Northampton, MA  
Energy metering and efficiency projects

MSPCA, Jamaica Plain, MA  
Strategic electrification

Brandeis University, Waltham, MA  
Sustainable energy investment program

Dartmouth College, Hanover, NH  
Energy efficiency program

45-55 Brighton, Boston, MA  
HVAC system design for new construction



HISTORIC<sup>®</sup>  
NEW ENGLAND

*Defining the past. Shaping the future.*

151 Essex Street  
Haverhill, MA 01832  
tel 617-227-3956  
HistoricNewEngland.org

January 11, 2023

The National Endowment for the Humanities  
Office of Challenge Programs  
400 7th Street SW  
Washington, DC 20506

To the Office of Challenge Programs:

Historic New England has innovated preservation practice for more than a century and is exceptionally well-positioned to assume a leadership role among peer organizations affected by the climate crisis. Cultural institutions provide essential benefits and quality of life to communities, and to continue this role within the communities we serve, we acknowledge that we must urgently adapt.

We commit to addressing the global climate crisis through actions that will reduce or eliminate our greenhouse gas emissions, promote the resiliency of our properties, engage our communities, and advance climate justice and energy equity. We recognize that our collections, properties, and programs are assets for climate action, and that using our platform to advance sustainability objectives and decarbonization goals is morally imperative.

Work is ongoing to advance our understanding of our own carbon footprint by identifying sources of carbon emissions and by carefully analyzing energy usage data at each of our thirty-eight properties. With this data in hand, we will finalize an institutional Climate Action Plan in 2023 that will articulate our commitment to achieving 'net zero' status at each of our sites by 2050.

We recognize that meeting this target will require time, dedication, and significant financial resources. We are committed to prioritizing the implementation of the Climate Action Plan, emphasizing its importance to our funders and supporters, and sharing lessons learned with peer institutions and the public.

Sincerely,

Vin Cipolla  
President and CEO

Jim Hunnewell  
Chair, Preservation Committee



January 12, 2023

The National Endowment for the Humanities  
Office of Challenge Programs  
400 7th Street SW  
Washington, D.C. 20506

To the Office of Challenge Programs:

GreenerU is a Waltham, Massachusetts-based firm that helps institutions navigate the steps to climate neutrality through planning, engineering, and implementation. We envision that community institutions can lead the world in mitigating climate change.

We are proud to partner with Historic New England on their proposed project to demonstrate how cultural organizations regionally and beyond how climate action and preservation are compatible values that can benefit entire communities.

As core external members of Historic New England's project team, we will guide strategic planning and provide technical expertise to translate the goals of their climate action plan into detailed plans for decarbonizing two high-profile historic sites. Most importantly, the development of these plans will be a collaborative process. Historic New England staff will participate in the facilitation of strategic planning and learn the tools and techniques of this process such that after this project is complete, staff may independently lead the development of additional site-by-site plans for climate neutrality.

We wholeheartedly support Historic New England's climate goals and their application for support from the National Endowment for the Humanities, and we look forward to being a part of the project team.

Sincerely,

A handwritten signature in black ink, appearing to read "J. Haugh", written in a cursive style.

Jennifer Haugh  
Director of Planning and Customer Engagement

January 11, 2023

The National Endowment for the Humanities  
Office of Challenge Programs  
400 7th Street SW  
Washington, DC 20506

To the Office of Challenge Programs:

I write to express my enthusiastic support of Historic New England and their application for funding from the Climate Smart Humanities Organizations program. This program presents a springboard opportunity for Historic New England to expand their ongoing strategic planning efforts to include detailed implementation plans for carbon neutrality at two highly visible and active museum sites.

Since June 2022, I have had the pleasure of working with Historic New England's team as the facilitator for the Boston Green Ribbon Commission's (GRC) Collaborative Climate Action Planning (CAP) program. In their CAP work so far, they have drafted an organizational climate commitment statement, started the process of inventorying greenhouse gas emissions for target sites, and laid the groundwork for assessing how their operations, relationships, and anticipated changes to the climate will affect their site communities. I will continue to facilitate their strategic planning through June 2023, through which they will finalize their first institutional Climate Action Plan.

The eight cultural organizations in the GRC's 2022/23 cohort are mission-driven, diverse in size and scope, and committed to thinking collaboratively about resiliency, mitigation, and climate justice. Historic New England stands out among this group for the sheer magnitude of their task: to plan for action across thirty-eight different properties in five different states, ranging in age from nearly 100 to 350+ years, while ensuring that any physical or operational changes do not negatively impact the historic integrity of their sites.

The organization has chosen not to use their unique challenges as an excuse for inaction, and completion of their proposed grant project will demonstrate to other stewards of threatened, irreplaceable resources that proactive climate mitigation is a realistic goal. I applaud their efforts to-date and I look forward to providing continued planning support. Thank you for your time, attention, and careful consideration of Historic New England's application.

Sincerely,



Dallase Smith  
Founder and Principal, Trust  
Facilitator, Boston Green Ribbon Commission Collaborative CAP

# CERTIFICATION OF GIFTS/PLEDGES

OMB control number 3136-0134,  
expiration date October 31, 2024

FAIN

Recipient  
Organization

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

Report Number

Date Submitted

## Donor Category

## Number of Donors

## Amount Given

Individuals

\$

Corporations or businesses

\$

Public or private foundations

\$

Labor unions, associations

\$

Nonfederal government units

\$

Affiliated groups

\$

Special events, benefits

\$

Other

\$

## Total amount

\$

The amount certified in this letter includes pledges in the amount of

\$

Documentation attached for pledges certified?

### For General Support Grants to State Humanities Councils only

The matching funds released by this certification will be used as follows:

Regants \$

All other categories \$

I certify that the total amount has been received in the form of a gift or gifts which have been donated to my organization; meet the criteria for eligibility established by NEH; will be expended for grant purposes during the grant period; and that documentation that substantiates the amounts, sources, eligibility and expenditure of the gifts will be retained for three years following the submission to NEH of the final financial report for this grant. If pledges are included in the total, I certify that (1) the pledges are legally enforceable, (2) the donors are obligated to pay the pledges during the grant period, and (3) the immediate release of matching funds is necessary to carry out grant activities.

Institutional Grant Administrator

If you are using this form outside the NEH's electronic Grants Management System (eGMS), enter the name of the Institutional Grant Administrator (IGA) in the field above. Print a copy for the IGA's signature, scan the signed copy, and e-mail it to [grantmanagement@neh.gov](mailto:grantmanagement@neh.gov).

Public reporting burden for this collection of information is estimated to average 30 minutes per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other suggestions for reducing this burden to NEH Office of Grant Management, Washington, D.C. 20503, [grantmanagement@neh.gov](mailto:grantmanagement@neh.gov).





THE 1772 FOUNDATION  
*Preserving American Historical Entities*  
WWW.1772FOUNDATION.ORG

November 23, 2022

Mr. Vin Cipolla  
President and CEO  
Historic New England

Dear Mr. Cipolla:

The Trustees of The 1772 Foundation, Inc. have approved the following restrictive grant:

**Amount of Grant:** \$200,000 (\$100,000 to be paid in January of 2023, \$100,000 in January of 2024)

**Restrictive Purpose of the Grant:** Sustainability and Climate Action work as outlined in grant proposal

The grant is to be utilized for the above purpose. Funds are not to be used for any other purpose.

**Non-profit status:** It is our understanding that your organization has been recognized by the Internal Revenue Service as a tax-exempt organization described in section 501(c) 3 of the Internal Revenue Code, that the designation as shown in your application is still in effect, and that your organization is not a private foundation as defined by the IRS.

\*Upon receipt, a letter acknowledging the grant (**please include the amount and date received**) should be e-mailed to [maryanthony@1772foundation.org](mailto:maryanthony@1772foundation.org).

\*Please provide The 1772 Foundation, Inc. with a progress report no later than September 31, 2023. *In the report, please describe the progress toward accomplishing the objectives as set forth in your proposal. Include copies of any significant materials, newsletters, brochures, articles, and other publicity that shed light on the project or your organization's activities. If additional time is needed, please inform us of this in your report. Your organization may be required to return the full amount of the grant to The 1772 Foundation, Inc., if these guidelines are not met.*

**Publicity:** The 1772 Foundation, Inc. encourages grant recipients to obtain as much publicity for these awards as possible. It would be appreciated if the Foundation were notified of any such publicity.

Congratulations! We wish you every success in this very worthwhile endeavor.

Sincerely,

Mary Anthony  
The 1772 Foundation, Inc.



(b) (4)

Society for the Preservation of New England Antiquities

Project  Subaward/Consortium

10/01/2023

12/31/2024

Mr.	Benjamin		Haavik		(b) (6)	12.00			(b) (6)	(b) (6)	(b) (6)
PD/PI											
	Marissa		Mayo		(b) (6)	12.00			(b) (6)	(b) (6)	(b) (6)
Project Manager											
	Sustainability Coordinator		TBD		50,000.00	12.00			0.00	0.00	0.00
Project Coordinator											

[Add Attachment](#) [Delete Attachment](#) [View Attachment](#)

0.00

22,868.00

0	Post Doctoral Associates				0.00	0.00	0.00
0	Graduate Students				0.00	0.00	0.00
0	Undergraduate Students				0.00	0.00	0.00
0	Secretarial/Clerical				0.00	0.00	0.00
0	N/A				0.00	0.00	0.00
0							0.00
							22,868.00

---

N/A

0.00

Add Attachment

Delete Attachment

View Attachment

0.00

0.00

---

Domestic Travel Costs ( Incl. Canada, Mexico and U.S. Possessions)

0.00

Foreign Travel Costs

0.00

0.00

---

Tuition/Fees/Health Insurance

0.00

Stipends

0.00

Travel

0.00

Subsistence

0.00

Other

N/A

0.00

0

0.00

Materials and Supplies	0.00
Publication Costs	0.00
Consultant Services	25,161.00
ADP/Computer Services	0.00
Subawards/Consortium/Contractual Costs	0.00
Equipment or Facility Rental/User Fees	0.00
Alterations and Renovations	0.00
N/A	0.00
N/A	0.00
N/A	0.00
N/A	0.00
N/A	0.00
N/A	0.00
N/A	0.00
N/A	0.00
N/A	0.00
N/A	0.00
N/A	0.00
	25,161.00

48,029.00


(Agency Name, POC Name, and POC Phone Number)

48,029.00

48,029.00

(Only attach one file.)

		22,868.00
		0.00
Total Number Other Personnel	0	
		22,868.00
		0.00
		0.00
Domestic	0.00	
Foreign	0.00	
		0.00
Tuition/Fees/Health Insurance	0.00	
Stipends	0.00	
Travel	0.00	
Subsistence	0.00	
Other	0.00	
Number of Participants/Trainees	0	
		25,161.00
Materials and Supplies	0.00	
Publication Costs	0.00	
Consultant Services	25,161.00	
ADP/Computer Services	0.00	
Subawards/Consortium/Contractual Costs	0.00	
Equipment or Facility Rental/User Fees	0.00	
Alterations and Renovations	0.00	
Other 1	0.00	
Other 2	0.00	
Other 3	0.00	
Other 4	0.00	
Other 5	0.00	
Other 6	0.00	
Other 7	0.00	
Other 8	0.00	
Other 9	0.00	
Other 10	0.00	

48,029.00
48,029.00
48,029.00

*Society for the Preservation of New England Antiquities d/b/a Historic New England  
NEH Funding Opportunity 20230117-CL: Climate Smart Humanities Organizations  
Budget Justification*

Historic New England’s federal funding request corresponds to Phase 2 of the larger planning project detailed in our Project Narrative. Total costs for both phases and identification of cost share to be incurred within the anticipated federal period of performance are provided in the table below:

		NEH Grant Period		NEH Grant Period	NEH Grant Period
Budget Categories	Phase 1: 01/2023 – 10/2023	Phase 2: 11/2023 – 12/2024	Total Cost	Federal Funds Requested	Cost Share
<b>Personnel</b>					
B. Haavik	(b) (6)	(b) (6)	(b) (6)	(b) (6)	\$0
M. Mayo	(b) (6)	(b) (6)	(b) (6)	(b) (6)	\$0
Sustainability Coordinator	\$62,000	\$65,100	\$127,100	\$0.00	\$65,100
<b>Materials and Supplies</b>					
Laptop, licenses, utility management software, monitoring equipment	\$8,384	\$0	\$8,384	\$0	\$0
<b>Consultant Services</b>					
Baselining and organization-wide emissions review	\$9,650	\$0	\$9,650	\$0	\$0
Planning, energy audits, and development of decarbonization plan (Casey Farm)	\$42,991	\$0	\$42,991	\$0	\$0
Planning, energy audits, and development of decarbonization plan (Pierce House)	\$0	\$25,161	\$25,161	\$25,161	\$0
Ongoing Support	\$5,937	\$5,938	\$11,875	\$0	\$0
<b>TOTALS</b>	<b>\$150,121</b>	<b>\$119,067</b>	<b>\$269,188</b>	<b>\$48,029</b>	<b>\$65,100</b>

**A. Senior/Key Person**

**Project Director, Benjamin Haavik, Team Leader – Property Care**

Approximately 270 hours @ (b) (6)/hr = (b) (6)

Fringe Benefits @ 24% = (b) (6)

Total cost: (b) (6)

Role: Mr. Haavik will oversee all aspects of project implementation. He will participate in planning sessions, engage with stakeholders, ensure that the project meets institutional and preservation standards, review deliverables, and support fundraising.

**B. Other Personnel**

**Marissa Mayo, Property Care Operations Manager**

Approximately 116 hours @ (b) (6)/hr = (b) (6)

*Society for the Preservation of New England Antiquities d/b/a Historic New England  
NEH Funding Opportunity 20230117-CLI: Climate Smart Humanities Organizations  
Budget Justification*

Fringe Benefits @ 24% = (b) (6)

Total cost: (b) (6)

Role: Ms. Mayo will be engaged in all phases of the project to ensure continuity of approach with Climate Action Planning Efforts. She will supervise the Sustainability Coordinator.

**Sustainability Coordinator, TBD**

Approximately 2,080 hours @ \$25.24/hr = \$52,500

Fringe Benefits @ 24% = \$12,600

Total cost (cost share): \$65,100

Role: The Sustainability Coordinator will relieve Historic New England's property care staff of energy usage data collection, monitoring, and analysis tasks, and will drive and coordinate our engagement with the consultant team that will produce project deliverables.

**C. Equipment Description**

N/A

**D. Travel**

N/A

**E. Participant/Trainee Support Costs**

N/A

**F. Other Direct Costs**

Consultant Services

**GreenerU**

Fixed fee: \$89,678

Total cost: \$25,161

GreenerU will work closely with Historic New England for a period of 24 months (14 months within the federal period of performance). The GreenerU team will complete comprehensive energy audits and site sustainability assessments for Casey Farm and Pierce House and will facilitate the development of a detailed plans for achieving carbon neutrality, including stakeholder outreach and convenings, strategic planning sessions, and the creation of actionable plan with prioritized recommendations for capital projects.

**H. Indirect Costs**

N/A