

FREEMAN RESTORATION PROJECT CHRONOLOGY

- 16 May 2018 Freeman Center w/CT Trust applies for a \$50,000 grant from National Trust for Historic Preservation's African American Cultural Heritage Action Fund (AACHAF), submitting credentials of Northeast Collaborative Architects (NCA) for review of project architect in accordance with the National Trust's guidelines and requirements.
- 06 Jul 2018 AACHAF awards the Freeman Center a \$50,000 grant and approves NCA's credentials. Grant supports completion of a "make-safe" scope of work; secures building envelopes to provide safe access within both houses, as well as temporary site access for building owners, consultants, funders, and workers. The grant also supports completion of existing conditions and base drawings, conceptual design and construction documents, as well as cost estimates within the framework of a \$100,000 stabilization budget – the minimum needed to safeguard the structures until they could be fully restored and permit access to facilitate fundraising.
- 11 Jul 2018 Todd Levine convenes a meeting with D. Kooris, M. Tisdale, W. Haynes, A. Farrar Houel, W. Coleman, T. Gill, O. Nkwo and others to discuss the Preservation Block and the Freeman Houses. DECD, SHPO recommend that the Freeman Center leverage the funding from AACHAF and have project architects, NCA, complete bid level plans and specs for submission to DECD. This would allow the Center to receive \$1.4 million toward restoration of the Freeman Houses. Meeting attendees estimated such plans would cost approximately \$30,000 more than the amount AACHAF awarded. It was also agreed that "The architect throughout the process will be NCA, who meets the federal professional standards for Historic Architects as defined by the Development of the Interior." During the one-year grant period the Freeman Center raised an additional \$33,688 and paid the additional amount needed to complete bid level plans and specs for submission to DECD as requested. Anticipated receiving \$1.4 million from an unnamed developer, City of Bridgeport, and HUD.
- 31 Oct 2018 Meeting with Todd Levine, David Kooris, Rebecca French, Bill Coleman, Wes Haynes, Leigh Johnson at City Hall to discuss "funding for the Freeman Houses through a combination of City and HUD sources as mitigation for the demo of Preservation Block. The City had mentioned 300k for mitigation, and HUD through David may have another 200-300k to add to it."
- 12 Dec 2018 M. Tisdale submits Letter of Intent to Todd Levine, as recommended, requesting \$1 million in State funding. NCA estimates total project/restoration costs of **\$2,700,000** for complete restoration of both houses (exteriors, interiors, furnishings, landscaping, streetscaping). It is estimated that the exterior restoration of both structures, as well as the interior restoration of the Eliza Freeman House - complete with one, occupant-ready unit of affordable housing (in an existing 20th century rear addition) can be accomplished for **\$2.2 million**. Likely donations and grants totaling \$1.2 million are identified in the letter. 12/12/18 T. Levine says this suffices. Actual budget will be discussed at a later date.
- 21 Dec 2018 \$1 Million Good-to-Great grant award is announced.
- 18 Jan 2019 Executed Good-to-Great grant documents, provided by SHPO, delivered to SHPO by email and by FedEx in the morning.
- 06 May 2019 Update from NCA provided to Todd Levine
- 06 Jun 2019 Meeting with Todd Levine, Rebecca French, Marguerite Carnell, Bernicestine McLeod Bailey and Niels Heilmann, part of Resilient Bridgeport Section 106 consultation process, ongoing through the Final EIS and through the design process. Also prerequisite for allocation of \$300,000 from HUD for restoration of Resilience Center (Eliza Freeman House).
- 26 Sep 2019 Todd Levine asks M. Tisdale to submit a Good-to-Great application via website for the first time.

- 30 Sep 2019 City acknowledges receipt of executed Preservation Block MOA between SHPO, DECD, Freeman Center, City of Bridgeport, and 1136-1162 Main Street Managers providing \$300,000 of support for the restoration of the Freeman Houses. OPEd moves establishment of City of Bridgeport account and the Purchase Order move forward. Signed document provided by T. Levine for records.
- 30 Sep 2019 Todd Levine connects M. Tisdale/Freeman Center and Danette Loring/Brown, Paindaris and Scott for the first time to complete required workbook for funding, initiating provision of Good-to-Great contract documents to Freeman Center for completion and execution.
- 22 Oct 2019 After technical difficulties, website is now accessible and can receive Good-to-Great grant application.
- 10 Dec 2019 Application submitted, but website lacks ability to upload plans and specs.
- Dec 2019 Good to Great Freeman/DECD Grant Agreement fully executed.
- 17 Jan 2020 SHPO, Freeman meeting in Middletown with architects at NCA offices to discuss drawings, cost and timeline.
- 10 Mar 2020 Gov. Ned Lamont declares civil preparedness and public health emergencies in response to the COVID-19 pandemic.
- 07 Jul 2020 Freeman begins requesting Bridgeport sewer schematics in order to complete engineering plans.
- 01 Mar 2021 DEEP approves scope, plans, uses (no housing unit)
- 02 Aug 2021 City of Bridgeport provides sewer schematics to NCA
- 24 Aug 2021 Freeman Center completes application for zoning change, but cannot submit because City of Bridgeport has not completed and approved the new city zoning plan. No applications for zoning changes will be accepted until this happens.
- 08 Sep 2021 Conceptual Design Review, City of Bridgeport, Zoning Department. Design is approved. However, the Freeman houses are currently zoned residential, which only permits stabilization of the houses prior to zoning changes, which also require hearings before the Zoning Commission. This will be a lengthy process. Freeman creates supplementary design plans separated into two parts (phases of scopes) to permit project to go to bid in spring 2022 and begin promptly – Phase 1: Stabilization (which does not require zoning change) and can have building permits received, and Phase 2: Restoration (including completion of Eliza House for service). Design plans, not divided into two parts are maintained as well
- 01 Jan 2022 Bridgeport's new Zoning Plan goes into effect. Freeman prepares to go to bid. Sewer & water line inspections, HDMI inspections & plans, landscape architecture, draft contractor ads, Owner's Rep, bid documents, final designs incorporating City zoning suggestions, temporary stabilization. Freeman spent raised and spent a considerable amount of its own money between 2018 and 2023 to cover expenses that would not be covered by G2G.

SEE RJD MEMO

NOTES:

In 2021, with one paid staff and several functions, Freeman recognizes it is understaffed Anticipating the use of public funds and wanting to ensure best spending practices, Freeman decides to **use its own funds** to hire an owner's rep to manage the

bids and the project. Owner's reps save inexperienced developers money and time by keeping the project on track, ensuring quality throughout construction, and preventing cost overruns or change orders.

In preparation for going to bid, Freeman consulted with City on what work Freeman was free to do and what work would require a zoning variance. COB [DATE REQUIRED] said stabilization work could be done. With this feedback, Freeman used its own funds to get architectural plans for stabilization components to increase flexibility and potentially accelerate the overall construction timeline.

RJD posted a request for bids. There was a miscommunication between Freeman and RJD as to the content of the request. Freeman desired bids for the full restoration of Eliza House plus the stabilization of Mary House. What was in the request was stabilization of 2 Houses. Bids came in at \$3.3MM

Thinking this was a bid for restoration of Eliza and stabilization of Mary (as described above), Freeman communicated this figure to SHPO. SHPO's feedback was to prioritize the full restoration and opening one house.

In review of the bids Freeman realized that the \$3.3MM bid was, in fact, for stabilization of both houses.

RJD put out bids for the full restoration of both houses, with each itemized so that Freeman could both restore Eliza House as per SHPO advice, but also know the cost for Mary House for further financial planning. Bids came in at \$2.99MM for Eliza House and \$4MM for Mary House.

Freeman immediately sought additional funding sources to make up the gap and thus, applied for CIF using the recent, market-based bids.

While disappointingly high, these most recent bids are deemed most accurate by the Freeman Center. Freeman believes these are the highest quality estimates because

- Market bids by the few qualified restoration bidders are more accurate than non-market cost estimates.
- The specialization required to do the restoration work reduces the eligible number of bidding firms and results in more volatile pricing.
- The Mortenson Construction Index, <https://www.mortenson.com/cost-index>, shows that recent construction costs have seen a great deal of inflationary pressure over the several years since NCA's original \$2.2MM cost estimate.