

Auchmar Estate Operations Plan



Tourism and Culture Division
Planning and Economic Development
June 2016

Executive Summary

On 17 October 2012, the General Issues Committee (GIC) received the Proposed Use Concept Profile for the Auchmar Estate (Appendix A to Report PED12193). GIC directed staff to proceed with the development of an operations plan based on that profile and to issue.¹

This study is an analysis of the use concept which combines three primary adaptive re-uses for Auchmar:

1. Community use
2. Private rental use
3. Public sector use

It also provides project goals, assumptions, constraints, examples of similar and successful adaptive re-use projects, project expenses and revenues.

The intent of the proposed adaptive re-use is to provide extensive public access and community engagement while minimizing the annual contribution to the operating budget from the municipal levy. This will be achieved through careful cost control and

¹In addition to the operations plan, Committee directed staff to develop an Expression of Interest (EOI) for the potential private use and/or sale of the Auchmar Estate.

On the basis of the EOI process, at the September 5th, 2013 General Issues Committee, staff was directed to proceed with a non-binding Request for Proposals (RFP) for the potential private use and/or sale of the Auchmar Estate (PED13151). Two submissions were received and evaluated by a panel of City staff, Ontario Heritage Trust staff and external heritage consultants. Neither proposal received a passing score.

At the 20 May 2015 General Issues Committee meeting, staff advised that no further action be taken on these proposals. At that time, GIC directed staff to proceed with the sale of Auchmar, subject to a use terms and conditions which protected the heritage resources as defined by the Heritage Conservation Easement held by the Ontario Heritage Trust and the Municipal Heritage Designation. Staff was directed to return to GIC with the outcome of negotiations with potential purchasers.

Pending the outcome of the EOI and non-binding RFP process, staff had placed the operations plan on hiatus. However, it is now appropriate to complete the work of the operations plan, in order to provide an alternative for consideration to retain the heritage facility within the public realm.

maximizing certain high yield private rental uses in a manner which does not significantly interfere with public access.

Controlling the intensity of programming and use of the site will also minimize the impact on the irreplaceable heritage resources. Fortunately, this is consistent with a program of relatively low impact and passive public and community programming and revenue generation initiatives which focus on certain low cost, high yield activities. In practice, this means seeking out such opportunities as smaller, intimate wedding ceremonies, commercial filming and photography, meetings, exhibits and workshops rather than large wedding receptions, concerts, festivals and events.

The current municipal levy impact for the operation of the Auchmar Estate is approximately \$23,000 per year. Based on existing revenue and expenses of comparable programs and operations within the Heritage Resource Management portfolio, it is reasonable to project that this levy impact could be reduced or eliminated in fully-realized Auchmar Estate operation.

The requirement to balance community and public use, participation and engagement with private rental use does restrict the potential for revenue generation and will mean that the facility will only recover annual operational costs. There is limited ability to develop a reserve from major maintenance projects or to offset the development capital costs.

It is useful to note that other adaptive re-use concepts are possible and potentially as valid as those under analysis in this report. However, this study will only assess the GIC approved concept.

Finally, it should be recognized that this proposal assumes that all capital work to restore the site to operating condition and any major maintenance and/or capital work in the future will be funded through the City's capital budget process.

The Auchmar Estate is the former residence of the the Honourable Isaac Buchanan, a prominent Hamilton merchant and politician. The estate has both historical and architectural importance and is among Hamilton's more significant cultural assets. A heritage conservation easement placed on the site by the Ontario Heritage Trust (OHT)

at the request of the City protects interior and exterior features and its architectural value by limiting the property's use and modification.

After many owners and usages, the City of Hamilton acquired the 3.8 hectare Auchmar Estate ("Auchmar") in 1999. It has been unoccupied since 2001. Although some improvements and stabilization efforts have been completed, the buildings are vulnerable to ongoing vandalism and deterioration.

Several private sector proposed uses have been explored for the buildings and grounds but they do not meet the requirements of the heritage conservation easement. There is public support to preserve the estate for a mixed public and private use and expectation of open access to the grounds.

Background

The Honourable Isaac Buchanan, a prominent merchant and politician built Auchmar as a family residence. Buchanan's contributions to local, provincial, and national history include: founding of the regiment that is now the Royal Hamilton Light Infantry; establishing the Toronto and Hamilton Boards of Trade; the first presidency of the Hamilton Club; rescuing the city of Hamilton from bankruptcy after the economic collapse of 1857; and leadership in the Hamilton Educational Movement, which pressed for improvements in the city's school system.

In 1852, Buchanan purchased a large plot of land on Hamilton Mountain, which became known as Claremont Lodge. On this site, he built a villa called Auchmar, named after his family's ancestral home in Scotland. The Buchanans lived at Auchmar until 1874. The property was sold to Alfred Triggs in 1881. Since that time it has been owned and used by various organizations. During WWII, the Royal Canadian Air Force used the facility as a convalescent home. The Sisters of Social Service purchased the property in 1945. The City of Hamilton acquired Auchmar in 1999.

The estate now comprises a 3.8 hectare (9.5 acre) site. The lands are distinguished by a mid-nineteenth century, Ontario Gothic manor house, a coach house, a dovecote, substantial stone garden walls and the remains of a formal picturesque landscape.

In addition to its historical importance, Auchmar itself is celebrated for its architectural significance. Auchmar's historical value as well as both its interior and exterior architectural value is noted in the heritage conservation easement placed on the site by the Ontario Heritage Trust (OHT).

The residence has been unoccupied since 1999 and the structure and stone walls show deterioration. The City of Hamilton has invested funds to minimally stabilize the building from further deterioration and to secure the building from vandals. In addition, brush and weeds have been cleared from the grounds to ensure public safety. Current work includes stabilizing the stone garden walls, roof replacement, exterior woodwork repair, restoring windows and selective restoration of the stucco exterior of the main house.

Dates of Significance

Purchase of Property by Sir Isaac Buchanan	1851
Construction of Auchmar	1855
Auchmar Sold by Buchanan	1874
Auchmar used as a convalescence home by the Royal Canadian Air Force	1943-1945
Auchmar owned by the Sisters of Social Service	1945-1999
Institutional wing added to the building	1963
Auchmar acquired by the City of Hamilton	1999
Part IV designation by the City of Hamilton	2000
Ontario Heritage Trust heritage conservation easement registered	2001

The grounds are open to the public for passive use such as walking. Portions of the residence have been open for public tours as part of the annual Doors Open event.

Overall Heritage Value

Auchmar has significant historical significance in the following three areas:

- Historical Value
- Architectural Value – Interior and Exterior
- Contextual Value

Historical Value:

Highlights of Isaac Buchanan's role in the economic, political cultural life of Hamilton and area include:

- Developed the largest wholesale business in the city and then worked with his partners to develop one of the largest and most profitable businesses of its type in Upper and Lower Canada.
- In terms of Provincial politics, Buchanan served from 1841-43 as the Toronto representative in the first Legislative Assembly of the newly formed Province of

Canada. After permanently moving to Hamilton in 1851, Buchanan served in the Assembly as a representative for Hamilton from 1857-1865.

- In 1864, Buchanan aligned with the Conservative government and served as the President of the Executive Council in the short-lived Macdonald-Tache administration.
- As a promoter of Hamilton's commercial future, Buchanan was instrumental in bringing the Great Western Railway to Hamilton in 1854.
- Buchanan is also remembered as an abolitionist, offering his estate to be used for Black Canadian's Emancipation Day celebrations as early as 1859.

Architectural Value:

Exterior

- Architecturally significant as one of Hamilton's most impressive 19th century estates and for its exemplification of Gothic Revival style architecture.
- The focal point of the property is the 'Manor House', a long, 'H' shaped villa completed in 1855.
- Like the home of a Scottish laird, which Buchanan may have hoped to emulate, the house features a roughcast stucco finish, clustered chimneys, and various Gothic details such as pointed arch windows and label mouldings.

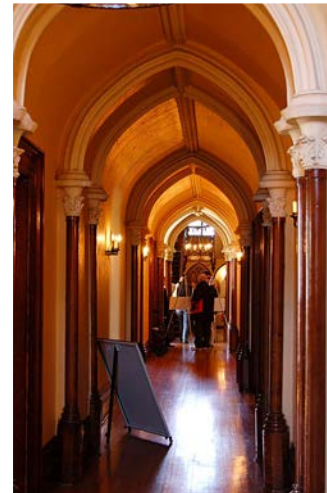


Interior

- The interior is similarly styled in the Gothic taste with the ballroom displaying a highly decorative, plaster, strap work ceiling, and corridors featuring vaulted ceilings with plaster ribbing.

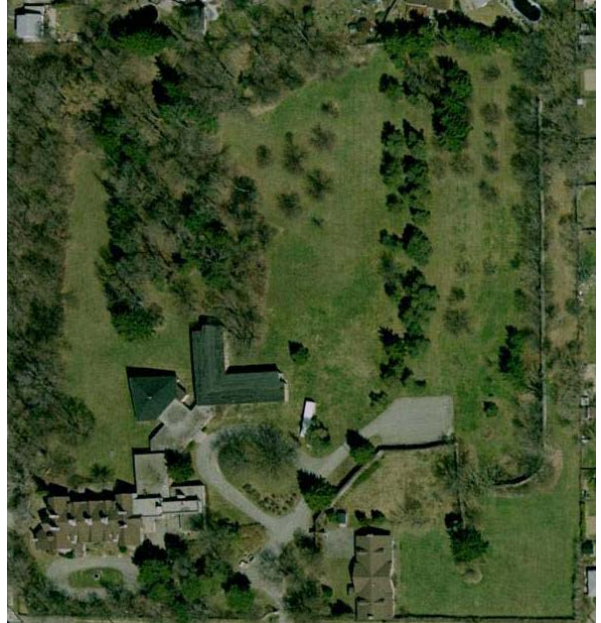


- Interior woodwork repeats the Gothic motif with slender shafts and foliated plaster capitals lining the corridor walls and the pointed arch incorporated into doorway frames and door panels.
- The unique plan of the house features a narrow, 24-metre central corridor with stair halls at each end.
- The pine detailing includes the slender, engaged shafts lining the corridors.



Contextual Value:

- Elevated placement upon the plateau ('The Mountain') overlooking the City of Hamilton.
- High, random-coursed limestone wall with buttresses and pointed arched openings encircle the property and garden.
- Entrance off Fennel Avenue with limestone gateposts and curved walls.
- Vestiges of the terraced landscaping on the north side of the manor house.
- Dovecote of limestone construction with lancet windows, pyramidal roof, and central, peaked gables.
- 1 1/2 storey, limestone construction coach house with cross gable roof.
- Vestiges of a pine tree-lined driveway.
- Informal, picturesque arrangement of mature plantings.
- Vestiges of quince and apple orchards.



Project Goals

The preservation and reuse of Auchmar as proposed will enable the City of Hamilton to:

- Preserve, adapt and utilize a significant built and natural heritage asset within the public realm

- Ensure that the operation and use are complementary to the natural and built resources,
- Develop partnerships with other service providers to support the development and operation of Auchmar.
- Provide a combination of uses and revenue streams to minimize any on-going municipal financial contribution.
- Ensure community involvement and participation in the development and operation of Auchmar.
- Partner with community groups and other organizations or individuals in the funding and preservation efforts.
- Provide green space in the Ward 8 neighbourhood.
- Meet the easement requirements of the Ontario Heritage Trust.

Project Assumptions

The following project assumptions apply:

- Auchmar is a heritage asset worth preserving for future generations.
- Auchmar should remain within the public realm and available for the public to enjoy
- The terms of the Heritage Conservation Easement require a level of public access.
- Revenue streams will be developed to offset on-going operational costs.
- Project has Council approval and support.

Project Constraints

The following projects constraints would apply:

- There are limited City of Hamilton capital resources available to support the Project.
- There is limited operational funding available to support the ongoing operation of the Estate.
- Ontario Heritage Trust Easement Agreement and the Municipal Heritage Designation inform and guide development approaches to the site.
- The entire property is zoned "C" District (Urban Protected Residential) in the City of Hamilton Zoning By-law No. 6593 and designated Major Institutional in the City of Hamilton Official Plan.
- The site is a sensitive heritage resource which cannot sustain extended high impact use.



Artist Concept of a restored Auchmar Estate with the Chapel and Dormitory removed and a new service wing/atrium constructed

The Business Concept

The adaptive re-use of Auchmar is, essentially, a Heritage Resource Management project. Heritage Resource Management (or HRM, also known as Cultural Resource Management or CRM) is, as the name suggests, the practice and profession of managing heritage within the legislative, regulatory, financial, political, and social expectations of a community.

It has been said we cannot live in the past; but we can visit. One view defines heritage as the postcards, t-shirts, knick-knacks and, most importantly, the stories we tell from our adventures in the past. They are the things we keep and the meanings we give to them. Taken together, they give us a sense of identity, place and belonging. Humans do this innately, often unconsciously.

More formally, a heritage resource is a place, building, object, event, ceremony or even person that people have placed value in or derive a sense of meaning or identity from. Some of these are tangible things but others are intangible. Very often, the tangible *thing* cannot be separated from the intangible *idea*.

In any case, it is the very intangible value or meaning which defines something as a heritage resource. A key component of that is the realness and 'authenticity' of the thing. The significance comes from standing where a real event took place or in the front hall of the real Auchmar.

Heritage Resource Management is a process with three inter-connected or inseparable components:

1. **Preserve** the heritage resource (through research, identification, conservation, monitoring and maintenance);
2. **Present** compelling stories and messages about the resource
3. **Sustain** the work financially, environmentally, socially and culturally

HRM does not attempt to 'save everything.' HRM focusses its efforts only on those projects that can achieve all three components.

An operations plan for a heritage facility (such as Auchmar) must consider each of these components and develop a suite of programs that balances preservation, presentation, and sustainability.

Generally speaking, the focus will be on relatively low impact programming (volunteer/community led tours, small events, gardening). That said, the appropriateness of limited larger events (say, a film festival or a celebration of Emancipation Day) will have to be assessed as the project develops.

This Operations Plan proposes three primary uses for Auchmar. These uses reflect the Proposed Use Concept Profile for Auchmar Estate (PED12193) endorsed by the General Issues Committee on 17 October 2012. The uses are:

Community Use

Community use includes access to the facility by any and all Hamilton community groups for meetings, functions, special events, or programs organized and delivered by the community. The use encompasses passive use of the residence or grounds for viewing and enjoyment by all Hamiltonians.

Potential uses could include but are not limited to:

1. Enjoyment of Auchmar on an informal, non-programmed basis for small group, family and individual activities, including heritage appreciation, and passive/casual recreational and play activities such as walking, sitting, outdoor painting, sketching and photography.
2. Opportunities for community groups to hold open meetings, annual meetings and training activities.
3. Leisure programs compatible with the unique nature of the facility and grounds delivered by community groups.
4. Cultural, environmental and heritage programming such as interpretive programs, community exhibits, tours, gardening seminars and workshops developed and delivered through community partnerships.
5. Opportunities for individuals and groups to volunteer to maintain the grounds and gardens, research and interpret the site.

6. Small-scale special events in partnership with community groups such as Doors Open.
7. Small office space for not-for-profit organizations.
8. A public research space with access to the Heritage Resource Management collections database and collections.

Private Rental Use

Private Rental use includes access to the facility through rental by individuals, groups, or businesses for social events, meetings, and activities.

Potential uses could include but are not limited to:

1. Social and special occasions such as wedding ceremonies, small receptions and private parties or gatherings.
2. Wedding, fashion, art, and nature photography.
3. Use by business for training and organizational development activities, conferences, seminars and meetings.
4. Commercial filming and photography.
5. Small scale office space for professional company/partnership.

Public Sector Use

Public Sector use means opening the facility to use by the public sector and City of Hamilton.

Potential uses could include but are not limited to:

1. Citizenship ceremonies, hearings, and meetings for municipal staff.
2. Public engagement/consultation activities.

3. Educational demonstrations, exhibits and projects related to the restoration of the buildings, structures, and grounds.
4. Workshop, lab, and office space.



Artist Concept of a restored Auchmar Estate with the Chapel and Dormitory retained

Operational Goals

The intent of this adaptive re-use is to provide wide public access to the full-restored site while limiting the annual operating levy impact. At the end of the development phase with full roll out of programming, the goal will be to make Auchmar fully sustainable for all annual staffing and regular maintenance costs with minimal municipal levy input.

In keeping with that approach, Auchmar will follow the fee structure in place at the Hamilton Civic Museums. All fees for Community and Public Sector Use (defined as 'core programming' by the museums) will be subsidized or waived to ensure maximum public accessibility. Private Rental Use fees will be established at full market rates. All private use programmes (also known as 'non-core') will be designed to generate money in excess of direct and indirect costs. In short, they will make a profit in order to subsidize other activities.

Strategic Alignment

The Auchmar Project is in alignment with identified City of Hamilton priorities as follows:

Plan	Goals/Objectives	Relationship to Project
City Strategic Plan 2012-2015	Strategic Priority #1 - A Prosperous & Healthy Community	<ul style="list-style-type: none"> -enhances Hamilton as a great place to live work, play and learn -contributes to development of sense of place -provides green space for recreational and cultural pursuits

Plan	Goals/Objectives	Relationship to Project
	Strategic Priority #2 – Valued & Sustainable Services	-residents and community groups have expressed support for retention of Auchmar and public access to grounds
Urban Hamilton Official Plan (Adopted by Council July 9, 2009)	Cultural Heritage Resources Policies (3.4), Policy Goals (3.4.1) and General Cultural Heritage Policies (3.4.2)	<p>-implementation will utilize partnerships among various public and private agencies and organizations. (3.4.1)</p> <p>-will encourage a city-wide culture of conservation by promoting cultural heritage (3.4.1.2)</p> <p>-adaptive reuse will contribute to achieving sustainable, healthy, and prosperous communities. (3.4.1.2)</p> <p>- Rehabilitation, renovation, and restoration of built heritage resources in order that they remain in active use. (3.4.1.4)</p> <p>- will promote public and private awareness, appreciation, and enjoyment of Hamilton's cultural heritage through public programmes or heritage interpretation activities, heritage tourism, and guidance on appropriate conservation practices. (3.4.1.5)</p>

Plan	Goals/Objectives	Relationship to Project
Cultural Plan	<p>Vision</p> <p><i>Our Hamilton is a unique destination of culture and natural beauty. Our proud history is visible, our neighbourhoods are colourful, our services accessible. Hamilton welcomes you for a day, a weekend, or a lifetime of discovery.</i></p>	<p>-contributes to the Vision</p> <p>-aligned with definition of culture and the Policy's guiding principles</p> <p>-contributes to Quality of Life, Quality of Place goal and action:</p> <p>7.4 Encourage and facilitate adaptive reuse of Hamilton's built heritage assets</p> <p>7.7 Steward our civic owned national historic sites and heritage facilities</p>

Building and Grounds Development Related to Use

Auchmar will be a multi-use facility with three primary uses: community, private and public.

The Residence

This mixed use will involve the main floor of the residence for daily rentals and second floor for longer term community organization office use. This is similar to leases in place at Tisdale House, Hammill House and Veevers Estate. Interior commercial filming and wedding photography will be permitted subject to careful controls to protect the heritage fabric



The Grounds

The stone walled grounds will be fully accessible to the community. Restoration of garden features² will be completed in partnership with community groups. Private park rental for wedding photography and rental/social use will be concentrated in designated areas. Future community ornamental gardens are feasible. Exterior commercial filming and wedding photography will be permitted subject to careful controls to protect the heritage resources.



² See *Vegetation Assessment of Wall and Kitchen Garden, Orchard & Cottage Setting*, 2009 and *Landscape Improvements Report*, 2010 by Wendy Shearer Landscape Architect

Coach House

The stables will be adapted for reuse as a leasable space for professional offices. Lease rates will be set at full local market value. This will enhance the security of the space by providing a regular daily public presence.



The Dovecote

The Dovecote will be stabilized and restored an architectural feature. Areas immediate adjacent to be used for appropriate community gardens (e.g. following patterns in use in Victorian era or perhaps a WWII era 'Victory Garden.'



Chapel and Dormitory

This cinder block addition was built in 1963. These are the only structures on the site not identified in or protected by the easement or designation.. This addition could be demolished and the space adapted for outdoor programming. Alternatively, the chapel could be retained for interpretive and social, corporate or public programming purposes.



Similar Adaptive Re-Use Projects

Other examples of this adaptive re-use model include Paletta Mansion in Burlington, George Brown House in Toronto, and in London, Grosvenor Lodge and the Elsie Perrin Williams Estate.

Paletta Lakefront Park and Mansion

The property is owned and maintained by the City of Burlington. The main house and formal gardens are available for rental functions and civic programs through a third party supplier. The stable, now identified as the Orientation Centre, houses story boards which provides visitors with a history of the park and its evolution. The gatehouse is rented to a community organization. The property also features the Dofasco Shoreacres Creek Discovery Trail.

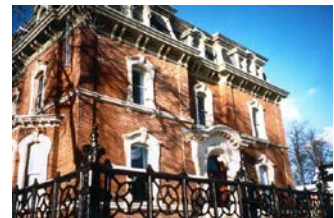


The mansion stands on a 14 acre lakefront property. The limestone mansion is an 11,000 square foot house designed by Stewart Thomson McPhie, in association with Lyon Sommerville. It was built in 1930 as a summer home for Edythe Merriam MacKay, daughter of industrialist Cyrus Albert Birge. The site features three other buildings: a gatehouse built circa 1912: a children's playhouse and stables.

Restoration began on the mansion in April 2000 and was completed in December 2000.

George Brown House

George Brown House is owned and operated by the Ontario Heritage Trust. The house is used as a rental facility with tenant offices on the upper two floors. George Brown House has four private rooms available for rent and a capacity of 8 to 50 guests. George Brown House, a 9,000-square-foot Second Empire-style house, was built for George Brown between 1874 and 1876. Brown was a Father of Confederation, founder of the Globe newspaper (now the Globe and Mail) and a leading Liberal politician.



The home was a residence until 1916 at which time three-storey school for the blind was built at the back of the house. This house was used as office space for the Canadian National Institute for the Blind from 1920 to 1956. A school for developmentally-challenged children followed until it was demolished in 1984.

The house was declared a National Historic Site in 1976 and was threatened with demolition in the mid 1980's. The Ontario Heritage Trust purchased and restored the property and reopened it in 1989. It has operated successfully as an adaptive re-use facility since then.

The Victorian library was re-created by the federal government and now houses 2,000 of George Brown's personal books. A Victorian-inspired garden was planted in the summer of 2000 – the first project funded by a donation to the Trust's Heritage Garden Conservancy Fund. A partnership with the University of Toronto Faculty of Architecture, Landscape and Design, maintains the gardens.

Grosvenor Lodge

Grosvenor Lodge is a City of London owned historic estate. It is managed by the Heritage London Foundation. The Lodge houses the London Regional Center for Heritage and the Environment. The Lodge is available for rentals and has a capacity of 50 people for a sit down dinner and 100 for a cocktail style reception.



Grosvenor Lodge was built in 1853 by Samuel Peters. The Lodge was the Peter's family home for three generations, until granddaughter Leila's death in 1974. It was sold to the University of Western Ontario in 1972 on the condition that it is preserved as a heritage site. It was designated by the City the same year. In 1981 the London Library Board took it over and it opened as the Lawson Museum and Heritage Centre. It has been managed by the Foundation since 1992.

Elsie Perrin Williams Estate

The Estate is City of London owned and operated by the Heritage London Foundation. The Spanish style residence is located on 68 acres of parkland. The grounds are open year round to the public and include a walking trail. The house and grounds are available for rentals. The ground floor capacity is 80 seated or 120 standing.



Bell-Gairdner Estate

The Bell-Gairdner Estate is owned by the City of Mississauga which operates the site as a wedding, reception and conference facility. The interior can accommodate 55 dinner guests. The ground has space for a tented area for receptions up to 200.



Willstead Manor

Willstead Manor is a 36-room mansion, circa 1906, that sits within a 15-acre park. Today, it is operated by the City of Windsor as a venue for weddings, receptions, meetings and other special events. There are various room capacities available from 10 to 120 at tables or over 200 for receptions. Catering is provided by a third party supplier.



Proposed Impact of Concept

The proposed Operations Plan envisions a number of significant changes to the site. These are necessary to meet the principles of Heritage Resource Management (Preservation, Presentation, and Sustainability) and to make the goals of the Plan (public and community access with minimized financial impact) possible. At this point, planning has reached the concept stage. Following approval of an operations plan, final design will begin. Some work is required prior to moving to final design:

- A major fire and building code review
- A change of zoning
- A full and detailed structural review of loading of floor structures
- A Designated Substances review

It is useful, at this stage, to consider the impact of the concept on the heritage resources of Auchmar. For simplicity, the following analysis follows the requirements of the 2014 Non-Binding Request for Proposal. Some general comments can be made first:

- Although stated in various places below, archaeological work is fundamental to good heritage resource management practice. It is required for all alterations that are below ground level. Where possible, resources will remain in situ. Full mitigation will be considered only where intended re-development is necessary and the resources cannot be protected without removal.
- Further, careful documentation and investigation (which can be seen as 'above ground archaeology') is just as important as below ground archaeology. It will be conducted on an on-going basis throughout the project.
- This project is currently in the concept phase and many changes will occur during later design, not least to accommodate public safety requirements and the Building Code but also to follow a minimally intrusive design. In addition, some significant changes to the design will occur during the actual restoration phases to accommodate new discoveries and challenges.

- Similarly, notwithstanding all of the detail listed below, this is still a very high-level analysis. Important decisions (e.g. which precise areas of plaster can be retained and which cannot) cannot be made with confidence at this time.
- The Ontario Heritage Trust and the Municipal Heritage Committee must approve all alterations.
- The following sections discuss, in turn, historical value, architectural value, contextual value, cultural landscape value, and non-heritage value. There is, necessarily, considerable overlap and some redundancy in explanation is unavoidable.

Historical Value

Proposed uses enhance or explain the historical significance of Isaac Buchanan's role in Hamilton and broader economic, political and social role.

Approach does not put at risk the ability to tell this story.

How the proposed concept will enhance the presentation and communication of the key heritage messages

- Auchmar will be available to the public on a regular basis through on-going programming (e.g. tours, workshops, exhibits, interpretive panels and/or mobile device based interpretation). See below.
- Public Programming will be passive and will preserve the integrity of the history of the site. See below for examples however, the working assumption is that many visitors to Auchmar will be initially attracted for other purposes (a meeting or reception). Rather than expecting visitors to engage in a full guided tour or detailed didactic exhibits, the public programs will focus on providing 'snapshots' and 'vignettes' and 'a-ha' moments.
- The community will be actively engaged in the development in implementation of the programming.

- Examples may include:
 - Outdoor exhibits, including interpretive panels, commemorating the significant historical era of the site (from pre-European Contact through the 1990s). Sites for panels will be chosen for the least impact to the site and archaeology will be done prior to any installations into the ground. Alternative delivery systems (e.g. virtual tours delivered through smartphone) are equally viable.
 - Rotating indoor exhibits, developed by community groups in partnership with Tourism and Culture which interpret the history of Auchmar and Hamilton Mountain Heritage
 - Small permanent but unobtrusive exhibits highlighting key architectural features that illustrate the evolution of the main building from home to hospital to religious centre.
 - Walking tours of the grounds (either print, mobile device based)
- The proposed use of the site will not remove significant heritage resources and will be low impact to the site and therefore will not put at risk the ability to tell the story of the site over the long term.
- The interior use will retain the original form and layout of the house allowing for a full appreciation of the story of the house from the Buchanan era to the present.

Architectural Value

Proposed use does not impact negatively on the interior or exterior architectural details, or put these features at risk.

Least impact approaches have been identified among options.

Work proposed demonstrates current good conservation practice and standards.

An itemized description of each proposed modification/alteration to the protected heritage buildings and structures, with reference to all municipal and provincial protections.

A demonstration of the necessity of the modifications and alterations including considerations of alternatives.

An outline of how the work would be done to minimize impact and to demonstrate good conservation practice (reversibility, documentation, retention of pieces etc.).

All alterations that will take place on the grounds and buildings will be informed by the Standards and Guidelines for the Conservation of Historic Places in Canada published by Parks Canada and endorsed by the Ontario Heritage Trust which includes the following direction:

- Conserve the heritage value of a place and do not substantially alter the character defining elements
- Do not move a building as its setting is a character defining element
- Adopting a minimally invasive approach
- Do not create a false sense of history by adding elements from another historic property or period
- Find a use that requires minimal change to the character defining elements

- Stabilize and protect the character defining elements until any subsequent intervention is made
- Protect and preserve the archaeology of a place
- Ongoing maintenance of the character defining elements
- Document all character defining element before alterations and document any changes
- Repair rather than replace, when replacement is needed, replace in kind. Where evidence is not available to replicate, make the form compatible with the existing character of the place.
- Make any new additions to the property without damaging the character defining elements. Additions should be physically and visually compatible with but distinguishable from the historic place.
- Make the addition or alteration so that the essential character defining elements will not be impaired if the addition is removed.

MAIN HOUSE

- The main house is now structurally sound and the building envelope is intact. Extensive restoration of the roof, chimneys, exterior stucco, and windows has been carried out. However, much interior restoration is required. All proposed alterations are subject to Building and Fire Code review, final design, consultation with, and approval from the Ontario Heritage Trust (OHT) and the Hamilton Municipal Heritage Permit Subcommittee.
 - In many places, the plaster is in very decayed condition. Wherever possible, plaster will be consolidated in situ. Where necessary, new, replica plaster will be installed.
 - Woodwork, including floors and trim, is in generally good condition but will require re-finishing.
 - The Main House will require a new Heating/Ventilation and Air Conditioning

(HVAC) system in order to meet modern public expectations of comfort. These can be quite disruptive of the integrity of a site if not carefully planned. Subject to final design and consultation with and approval from the Ontario Heritage Trust (OHT) and the Hamilton Municipal Heritage Committee Permit Subcommittee, proposed mitigations include:

- Installation of a flexible low impact minimally intrusive mini-duct system (e.g. the Unico System or similar), to supply supplemental heating and air conditioning
 - Use a duct system with 2" in diameter flexible piping, which can be 'fished' through wall cavities without causing extensive damage to interior, finishes.
 - Primary heating will continue to use the existing 'use period' radiator system.
 - Main systems will be located in the basement in the location of existing equipment.
 - Services will be run to take advantage of the new elevator shaft and associated trunks as much as possible.
- Electrical upgrading will be required. The current wiring is inadequate for any larger scale public use (including any office tenancy on the second floor) and the new HVAC. Currently, the most likely requirement will be a new 1000 amp service and a new wiring throughout the house. This, too, can be extremely disruptive. Subject to final design and consultation with and approval from the Ontario Heritage Trust (OHT) and the Hamilton Municipal Heritage Committee Permit Subcommittee, proposed mitigations include:
 - Installation will be done to minimize plaster damage and will take advantage of pre-existing plaster failure openings that will have to be restored.
 - For reasons of fire and electrical safety, new wiring will be installed wherever feasible and the historical material retained (disconnected

but in situ)

- Final design will take advantage of opportunities to 'screen' or de-emphasize the sight of new electrical fixtures.
 - Surface mounted wiring hidden in casings will be used when in-wall fishing of wiring is not possible.
 - Services will be run to take advantage of the new elevator shaft and associated trunks as much as possible.
- Similarly, the existing plumbing in the main house is not adequate for public use. A large number of additional washrooms will be required. The existing plumbing is old and designed for residential level use. Subject to final design and consultation with and approval from the Ontario Heritage Trust (OHT) and the Hamilton Municipal Heritage Committee Permit Subcommittee, proposed mitigations include:
 - Existing historic plumbing fixtures will be retained wherever possible and new modern services added as a parallel system.
 - Public services on the second floor will be grouped in one area along the rear of the house
 - Services will be run to take advantage of the elevator shaft and associated trunks as much as possible.
 - New washrooms on the first floor will be housed in a purpose built addition or possibly in the Chapel and connecting hallway to minimize disruption of the historic part of the house
 - Bathrooms will complement the existing architectural design.
 - The design for all new services (plumbing, electrical, Internet, wastewater) should assume new main connections to the street. Some excavation will be necessary. Wherever possible, excavation will follow the lines of existing trenching. Nevertheless, an archaeological survey will precede any work and monitoring will be conducted throughout.

- Fire separations may be required pending a fire code review of the building and may include full separation at each stairwell, (which may take the form of a wall and fire door) dedicated fire exits, sprinkler systems and fire safety signage and pull stations.
- Sensitive design will mitigate the impact and safeguard historic features due to alteration to ensure public safety.
- Some compromise of room occupancy levels and uses may be required to minimize the architectural impact (e.g. a lower occupancy on the second floor to avoid installing fire doors or a separate fire escape).
- Modern washrooms will need to be installed including AODA compliant washrooms. Installing these inside the first floor (for use by patrons of the ground floor rooms) would require significant removal of original material and possibly some structural work.

Subject to final design and consultation with and approval from the Ontario Heritage Trust (OHT) and the Hamilton Municipal Heritage Committee Permit Subcommittee, four possible Options for designs are proposed:

- i. Option 1: Creating a new small footprint washroom/support space and storage room on the west side of the building in a purpose built addition. This is the least intrusive way to accommodate the number of washrooms that are required.
 1. This façade is less visible than others are. The addition would be on the footprint of a former extension and would be finished to complement the existing exterior.
 2. Some archaeology has already been done at this location in support of foundation work but a survey will be conducted and monitoring will be done throughout the project.
 3. On the other hand, there is a concern that the archaeology in this area is high value and should be retained in situ. Building an addition here would be

inevitably destructive.

ii. Option 2: If the addition on the west façade is considered inappropriate, an alternative addition could be added to the east end of the north façade.

1. This is archaeologically less sensitive
2. The addition would be designed to sensitively reproduce the glass conservatories which were once a feature of the house
3. The addition could incorporate the elevator/lift (see below) into one addition
4. However, this addition might be considered more intrusive to the appearance of the building

iii. Option 3: A third option would partially re-create the appearance of the conservatory formerly located on the east end of the south façade in the area of the current garage.

1. This would restore the appearance of the principle façade.
2. It would be built largely on the site of a modern intrusion and would be more likely to be archaeologically 'clear.'
3. Some intrusions would be needed to connect this addition to the main building such as removing a room to create a hall to connect to the proposed elevator corridor at the rear of the building. These are significant relative to other options.

iv. Option 4: A fourth option would be to retain the connecting hallways and the Chapel and locate the washrooms and large meeting space in this area. The dormitories would be removed.

1. This would minimize the intervention to the front and rear facades.
 2. This would minimize the intrusion to the archaeology
 3. The residences to the east could be removed to create archaeologically clear space for parking and/or tents.
 4. The cost of this option could potentially be less.
 5. The Chapel would still be a visible part of the landscape which could be seen as a negative.
- Locating the washroom to the outside of the building or in the chapel rather than in the main historic house would:
 - Allow them to be used simultaneously for outdoor events (although options 1, 2 and 4 serve this purpose better than option 3)
 - Allow more architectural finishes to be retained
 - Allow more interior spaces to be used by the public.
 - Washrooms on the second floor will be located in Rm210³, which will not require removal of any walls or heritage features. This will also allow the original early 20th century tiled bathrooms to be retained unaltered.
 - Access to the first and second floors will require an Access for Ontarians with Disabilities Act (AODA) compliant elevator. Installing an elevator/lift on the interior would require very significant removal of heritage material, not just the more obvious trim and plasterwork but likely original structure as well.
 - As a matter of general policy, disrupting the structure of heritage buildings should be avoided wherever possible. Quite apart from the loss

³ See the Architectural Drawings section at the end of this report for the room numbering system.

of material, heritage structures are often built to different principles than modern buildings. Their stability is often the result of modifications over time and/or inherent redundancy. How loads are distributed and the condition of various support members is frequently obscure and poorly understood. Disrupting that stability must be approached with extreme caution and avoided wherever possible.

- Subject to final design and consultation with and approval from the Ontario Heritage Trust (OHT) and the Hamilton Municipal Heritage Committee Permit Subcommittee, the proposed mitigation is:
 - Install an elevator/lift on the North Façade approximately opposite Rm116/117. The exterior of the shaft would be cladded to complement the existing exterior.
 - Additional services (water, HVAC electrical, waste water, internet) would be installed in separate conduits within the enclosure to minimize disruption
 - The elevator will require enlarging two window openings to allow for floor level access. Nevertheless, we contend this is much less disruptive than other alternatives. The windows would be documented and sash windows and hardware conserved.
- Other modifications/services which are required for AODA compliance include (but are not limited to):
 - AODA complaint ramp installed at the front entrance and any additional fire exits. This will be integrated into the garden design
 - AODA complaint bathrooms on 1st and 2nd floors. See the discussion above
- Other anticipated modifications include:
 - Additional building security. Wireless sensors will be used. These require no wiring and can be attached to the building without screws.

- Modern public facilities require a full and robust internet service. This will be done wirelessly with a large capacity commercial grade server/router in a clean room. At this point, we anticipate installing the router in a service room on the second floor with network provided wirelessly to limit intrusion to the structure.
 - All historical lighting fixtures will be retained. This will ensure that the original ambience is preserved. However, some additional lighting (for cleaning and task lighting) will be needed. Subject to final design, the intent is to add lighting as unobtrusively as possible.
 - Auchmar is currently vacant and unfurnished. While technically not part of any consideration of preserving architectural value, a furnishing plan will be developed, incorporating what is known from historical records. Due to the anticipated high use, reproductions will be used.
- Inevitably, an adaptive re-use such as that proposed for Auchmar will require some level of kitchen facilities. One option is to use the historic kitchen space (Rm126/129). Another option, if the chapel is retained, is to upgrade the existing kitchen in the connecting hallway of the chapel complex. Subject to final design and consultation with and approval from the Ontario Heritage Trust (OHT) and the Hamilton Municipal Heritage Committee Permit Subcommittee, this is appropriate because:
 - Much of the original material in Rm129 is lost or very heavily damaged. Where heritage material exists, including wainscot, flooring and cabinetry, it will be retained; however, the additional modern facilities can be added to complement the heritage material but to a utilitarian commercial standard if Options 1-3 are chosen.
 - The existing kitchen in the Chapel hallway was originally built to provide food for a large number of people and can easily be retrofitted for catering use if Option 4 is chosen.
 - The Butler's Pantry (Rm126) is largely intact and can be gently used with minor modifications to protect the heritage material.

- The location of either kitchen is well placed for ease of use by caterers to bring services on to the site.
- The caterer's kitchen will not be a full-service commercial kitchen. Caterers will be required to prepare food off-site and use the kitchen strictly for final preparation, warming, and plating. This will lessen the requirements for separate venting and fire control (with the associated interventions required). It will also reduce capital costs and operating overheads (maintenance, licensing, and inspections).
- The small scale of the kitchen is in keeping with the overall approach of the adaptive re-use.⁴

Possible Tenants Apartment (Temporary)

Balfour/Chedoke is owned by the Ontario Heritage Trust but managed by the City of Hamilton. The building is unused while long term plans are developed and implemented. Vacant buildings are targets for vandalism, resulting in expensive and often permanent damage. Recently, the HRM Section made small modifications to Balfour/Chedoke to allow a tenant to use a small portion of the property. The occupants are interns in the Heritage Conservation Program at Willowbank School of the Restoration Arts. The tenants provide valuable security, maintenance and site facilitation functions.

A similar project is recommended for Auchmar while the restoration/adaptive re-use project is in development. Historically, Rooms 221 through 229 were servant's quarters. Some modifications would be required to the plumbing and wiring (described in detail above). However, subject to final design and the necessary approvals, additional modifications would include:

- Installation of a small kitchenette (possibly in Rm229)

⁴ Note that an alternative approach includes retention of the 1960s Chapel and Service Wing. If pursued, this option would eliminate the need to make modifications to this space since modern kitchen facilities would be included in a renovated 1960s Service Wing.

- Creation of a doorway between Rm226 and 228
- Removal of plumbing fixtures in Rm228

Alterations would be minimal and would conserve the character of the space. After the adaptive re-use development is complete, this space could become a 'wedding party retreat or bride's change room' or be retained as a small staff office.

Coach House

The Coach House could be renovated as an office for a professional/commercial operation (e.g. accounting firm or designer.) The interior would be a modern workspace. However, all changes to the building will reflect the character of the building for example: replaced doors will be based on historic photographs; interior features such as the wooden beams will be incorporated into the design. This public sector use ensures daily activity and presence on the site: a key protector against vandalism and theft.

- Subject to final design and consultation with and approval from the Ontario Heritage Trust (OHT) and the Hamilton Municipal Heritage Committee Permit Subcommittee:

Interior

- The building was extensively modified during the religious centre era and no heritage material remains on the interior. The interior will be finished as modern offices, workshops and public research spaces
- Interior structural members survive (e.g. beams and posts). These will be retained and incorporated into the design

Exterior:

- Most existing doorways are non-heritage material and will be replaced with reproductions based on archival research.
- The existing roof is past its effective lifespan and will need to be replaced. Where possible, original materials (e.g. sheathing) will be retained.

However, significant new material is expected to be required. This will allow the installation of new venting through non-heritage materials

- Some unsympathetic later architectural features will be removed and replaced with restorations based on archival research. New doorways, venting, roofing, restoration of architectural features is required.

Garden, Garden Wall, Dovecote

- Subject to final design and consultation, with and approval from, the Ontario Heritage Trust (OHT) and the Hamilton Municipal Heritage Committee Permit Subcommittee, the garden wall and dovecote will be retained and restored including repointing, re-roofing of the dovecote and conservation of the wooden elements, with no negative interventions anticipated. No active use of the structure is planned.

Dormitory and Chapel

- There are 2 options, as outlined above, which can be considered for the Chapel and Dormitories subject to final design and consultation with, and approval from, the Ontario Heritage Trust (OHT) and the Hamilton Municipal Heritage Committee Permit Subcommittee.
- Option 1: The dormitory and the chapel are removed from the site completely. They are not designated heritage resources. The historical value of the religious centre era will be documented and interpreted through a variety of programs (see above).
- Option 2: The Chapel and connecting hallway are retained and the Dormitory is removed from site. This retains a large portion of the religious centre era and allows for the washrooms, kitchen and large meeting rooms to be housed in an already existing structure with less sensitive architecture. The Chapel can also be used for wedding ceremonies.
- See below for a more detail discussion of the removal process for both options. All work will be extensively documented to industry standards, drawings and architectural samples will be retained.

- In both options, the removed building footprint will be stabilized and left open for events. By focussing activities and events on this footprint of disturbed ground, impact on non-disturbed land can be minimized.
- By removing the chapel and dormitories completely, the original site views to the mountain and from the north of the property brow will be enhanced. Removing the dormitories only, leaves the most aesthically pleasing portion of the religious centre, the Chapel with its stained glass and copper accents standing, while enhancing the views.

Contextual Value

Proposal use does not affect negatively on each of the following: the garden walls; other garden sculptures; details or context of the estate in its juxtaposition in the crest of the Mountain.

Least impact approaches have been identified among options.

Work proposed demonstrates current good conservation practice and standards.

An itemized description of each proposed modification/alteration to the protected heritage gardens walls, sculptures, with reference to all municipal and provincial protections.

A demonstration of the necessity of the modification/alteration including considerations of alternatives.

An outline of how the work would be done to minimize impact and to demonstrate good conservation practice (reversibility, documentation, retention of pieces etc.).

- The proposed alterations follow the Standards and Guidelines for the Conservation of Historic Places by Parks Canada and endorsed by the Ontario Heritage Trust. (See list above under Architectural).

- The proposed adaptive re-use does not anticipate making significant changes to the context of the Estate. In fact, where possible, the adaptive re-use plan will enhance the contextual value by removing modern intrusions and barriers.
- Options in the adaptive re-use plan allow for the option of including the Chapel and connecting hallway and preserving this context if this is determined to be desirable.
- In particular, subject to final design and consultation with, and approval from, the Ontario Heritage Trust (OHT) and the Hamilton Municipal Heritage Committee Permit Subcommittee:
 - The proposal includes completing the restoration of the garden, garden walls and dovecote. This will allow the removal of a number of disruptive retaining walls and fences.
 - The proposal will restore fencing on Fennel St and remove some of the undergrowth and modern hedging. This will enhance the context of the building as a prominent feature at the Fennel/West 5th intersection and the Hamilton Mountain in general.
 - By removing the Chapel and Dormitories or a portion of this complex, we will open up the original site views from the Main House and from the north end of the property towards the house.

Cultural Landscape Value

Proposed use does not impact negatively on each of the following: the historic gardens; topography; vegetation (species, proportions, colour schemes, spacing and respective heights); structural and decorative features.

Least impact approaches have been identified among options.

Work proposed demonstrates current good conservation practice and standards.

A description of each modification/alteration to the protected archaeological features, with reference to all municipal and provincial protections.

A demonstration of the necessity of the modification/alteration including considerations of alternatives.

An outline of how the work would be done to minimize impact and to demonstrate good conservation practice (reversibility, documentation, retention of pieces etc.).

- The proposed alterations follow the Standards and Guidelines for the Conservation of Historic Places by Parks Canada and endorsed by the Ontario Heritage Trust. (See list above under Architectural).
- The proposed adaptive re-use does not anticipate significant interventions into the heritage landscape. Where possible, heritage elements of the landscape will be restored to enhance the public experience and understanding of Auchmar.
- Subject to final design and consultation with, and approval from, the Ontario Heritage Trust (OHT) and the Hamilton Municipal Heritage Committee Permit Subcommittee, the proposal will reinstate the original picturesque landscape retaining mature plantings. Specifically:
 - Invasive and/or non-native vegetation will be removed except where the

non-native material forms part of the planned picturesque landscape

- Restoring and reinstating the original fencing on the Fennel side
- Restoring the garden wall and garden
- Adding various amenities (lighting, pathways, parking, signage seating)
- Archaeology will take place at the same time any intervention in the landscape is required. This includes during the removal or partial removal of the chapel and dormitories. These structures do not have basements and the extent of the foundations is not known. Some archaeologically significant resources may still exist under the foundations and will be retained in situ.
- Any expanded parking areas will take advantage of previously disturbed areas and use minimally invasive techniques to limit disturbance to the archaeology, vegetation, and viewsapes.
- Introduction of new pathways, pathways, seating, and lighting will enhance AODA compliance and concentrate wear on certain areas in the landscape minimizing damage to original features. Archaeology will be carried out to mitigate the alterations.
- Lighting for security and public safety will be selected which is complementary and considers archaeology and least impact to historical features.
- Full documentation including photography and retention of archaeological specimens and architectural samples will take place before, during, and after any intervention.
- Primarily, retention of original features of the landscape will provide the basis for any new design to the landscape. Any exterior furniture including but not limited to park benches, signage, curbing, lighting etc. will complement the landscape.

Non-Heritage Value

Changes to non-heritage resources can impact heritage resources in various ways (e.g. conflicting architecturally, impeding views, damaging heritage resources by the way the non-heritage material is constructed or maintained).

Least impact approaches have been identified among options.

Work proposed demonstrates current good conservation practice and standards.

A description of each modification/alteration to the non-heritage resource

A demonstration that the modification will not impact/affect protected heritage resources including the buildings, structures, landscape and archaeological resources with reference to all municipal and provincial protections.

A description of how the modification will impact/affect the adjacent properties, neighbourhood, and community.

- The adaptive re-use proposal envisions a number of changes to the non-heritage elements of Auchmar. Some are major (removal of buildings) and some relatively minor (changes to lighting pathways). However, all changes are intended to either:
 - Remove modern intrusions to enhance the heritage integrity of the site.
 - Improve public safety.
 - Conform to codes and legislation.
 - Improve public access.
- Subject to final design and consultation with, and approval from, the Ontario Heritage Trust (OHT) and the Hamilton Municipal Heritage Committee Permit Subcommittee, the adaptive re-use proposes:

- The removal or partial removal of the chapel, dormitory and car garage.
 - Installation of new pathways, lighting, signage, seating, and curbs.
 - Modest expansion of the existing parking lot.
 - Installation of new washroom facilities and an elevator/lift on the exterior of the main house.
 - Various AODA compliant ramps, doorways, washrooms and other amenities.
 - Installation of AODA compliant and accessible temporary and permanent interpretive devices and programs.
- The largest change, the demolition, will require careful planning. It will take place in a sensitive and non-intrusive capacity which would not negatively affect the heritage resources – for example a planned out demolition including placement of dumpsters, truck route, protection of adjacent heritage features, a sensitive method of removal of debris (known as 'intelligent demolition') and replacing the fill appropriately. The work will be documented thoroughly beforehand and during the work and will be monitored by archaeologists
 - The design of the elevator and washroom addition will be complimentary and yet recognizably distinct from the original structure. It will utilize such things as transparency to reveal the heritage features behind and a complementary colour palette. The impact on the heritage resources will also be minimizing by limiting the removal of historic material during the design process and the protection of all heritage features during construction. Permanent interior and exterior interpretive elements will complement architectural and landscape features.
 - Subject to discussions with the OHT, the option of housing the washrooms and other modern facilities in the chapel and connecting hallways may reduce impact to the main portion of the historic house and grounds.
 - If the removal of the chapel and dormitory is chosen, this will reduce the overall footprint of buildings in the landscape (especially of the non-heritage

resources). It is hoped that this reduction would permit the expansion of parking elsewhere on the property. Consideration will be given to:

- The viability of low impact, environmentally sensitive paving
- Careful site selection to minimize archaeological impact
- Designing the parking lot to allow any archaeological material to be protected and retained below grade (with an appropriate barrier to limit compaction)
- Scaling the size of the parking lot to reflect the low impact goals of the programming and the neighbourhood's concern to limit the scale of events on the property.

Operations Analysis

The City of Hamilton is committed through the Heritage Resource Management (HRM) Section to assuring its museums and heritage facilities remain strong, recognizing that future generations will judge the content and quality of its stewardship. HRM staff are stewards of these resources, on behalf of the people of Hamilton and Canada.

Business Model – Heritage Resource Management Section, Tourism and Culture

The Heritage Resource Management (HRM) Section of the Tourism and Culture Division, Planning and Economic Development includes 15 distinct units. A largest number of these (9) form the Hamilton Civic Museums. The museums preserve the heritage of Hamilton and Canada and present that heritage (through public programs such as exhibits, tours and special events) to residents and visitors. The 'three-legged stool' of preservation, presentation and sustainability exist in partnership. The Hamilton Civic Museums and associated heritage resources represent a legacy that, once lost, can never be replaced.

The Hamilton Civic Museums portfolio consists of:

- Fieldcote Memorial Park & Museum.
- Griffin House National Historic Site.
- Dundurn National Historic Site.
- Hamilton Military Museum.
- Whitehern Historic House & Garden National Historic Site.
- Hamilton Children's Museum.
- Hamilton Museum of Steam & Technology (1859 Hamilton Waterworks National Historic Site).
- Battlefield House Museum & Park National Historic Site.

- Hamilton & Scourge National Historic Site

In addition, the Heritage Resource Management Section also manages:

- The Conservation Program (i.e. the restoration and care monuments, cenotaphs and the preventive conservation of museum collections).
- The Collections Management Program which oversees the research, documentation, handling and storage of the museum collections.
- The Heritage Presentation Program including heritage plaques and other interpretive programming, heritage events, social media and publications focused outside the museum operations.
- Virtual Museums and other on-line content.
- The Heritage Strategies Program which develops city-wide heritage initiatives such the Archaeology Management Plan and the Built Heritage Inventory Review program. The program also oversees the implementation of the heritage-related Action Items in the City of Hamilton Cultural Plan.
- The Heritage Facilities and Capital Project Program including the care and maintenance of seventeen heritage facilities (including 40 buildings). Of the 17 heritage facilities maintained through the Heritage Facilities and Capital Project Program, nine are operated as historic sites. Eight more are adaptive re-use facilities of one kind or another. Several are leased to community groups, one is operated as a community programming facility and the remaining sites are under-development.

Organizational Structure

The Heritage Resource Management Section's ability to fulfill its purpose depends to a large degree on the professionalism and capabilities of its staff. As an employer, the City of Hamilton is committed to the safety, security, well-being and continued motivation of the people (paid and volunteer) working for it. As a section of the City of Hamilton, the HRM ensures that all human resource management activities are consistent with the City of Hamilton Human Resources Services Policy and Procedure Manual.

The Heritage Resource Management Section coordinates with several community partners that assist with the ongoing operations of Hamilton Civic Museums. In any year, some 25,000 hours of volunteer time is contributed to the Section's programs by over 600 volunteers. In addition, over a dozen community heritage groups partner with the Hamilton Civic Museums on programs and events of mutual benefit.

It is anticipated that similar community partnerships would be developed and maintained if Auchmar were to be restored and adaptively reused.

Operational Concept and Operational Hours

The Hamilton Civic Museums are open to the general public without appointment year round, Tuesday through Sunday in the afternoons. Hamilton's Civic Museums are often open outside of regular business hours for pre-booked groups and rental opportunities. There are 1500 to 2000 events of this kind every year. In fact, the bulk of the museums' school programming and non-core revenue generation programs are held outside regular museum open hours (i.e. in the morning or evening).

NOTE: It is not intended that Auchmar be open daily, operated or staffed as a historic house museum.

However, the operations of the museums/historic sites provide some insight into the costs, revenues, opportunities and constraints of an adaptive re-use plan for Auchmar.

It is proposed that Auchmar Estate (as a multi-use community and reception space) would be available for use on an as-needed basis. This would include:

- Core programming consisting of community and public sector use.
- community meetings, public and/or special events, workshops, demonstrations organized by volunteers and supporters and/or staff
- non-core programming consisting of private sector use:
 - social and corporate meetings and events
 - wedding ceremonies and photography

- commercial photography and filming

In practice, it is not expected that HRM staff will be responsible to develop and implement all public programming on a large scale. The work will largely be to coordinate the work of others and to facilitate community, public and private function operations. This work is fully consistent with the community programming and facility rental work carried out at the Hamilton Civic Museums.

Site Constraints and Program Scale

The vision for private and community programming at Auchmar emphasizes low impact and smaller scale operations. The business plan does not anticipate numerous large scale events, festivals or receptions. There are several reasons:

- The communities desire to have open access to the site would be disrupted if the site was regularly closed for large private functions.
- The heritage resource could not sustain that level of use without damage.
- Vehicle access and on-site parking is necessarily restricted due to the size and layout of the property.
- The interior spaces lend themselves better to small, more 'high end' and intimate receptions and events.
- Smaller events and programs reduce the operations costs and overhead.

Staffing – Event Coordination and Facilitation

The information below outlines the scope of duties related to coordinating and facilitating rental spaces within the Hamilton Civic Museums portfolio. The scope of duties is organized in the following four categories: pre- booking; post-booking; event duties; and post-event duties.

Scope of Duties – Rental Space Coordination and Facilitation

<p>Pre-Booking</p>	<ul style="list-style-type: none"> • Answer telephone and/or email inquiries • Meet with walk-in inquiries • Coordinate marketing with Tourism and Culture staff • Setup on-site viewings (e.g. organizer, photographer, cater) • Questions and Answers (e.g. Municipal Alcohol Policy, site restrictions, expectations) • Answer telephone and/or email inquiries • Meet with walk-in inquiries • Set up on-site viewings (e.g. organizer, photographer, caterer)
<p>Post-Booking</p>	<ul style="list-style-type: none"> • Create contract • Secure deposit and damage waiver • Review various conditions (e.g. MAP requirements, facility restrictions/rules) • Review set-up and event details with clients • SEAT issues if required • Obtain copies of all required licenses, insurance, and service staff credentials • Walk-through facility
<p>Event Duties</p>	<ul style="list-style-type: none"> • Facility cleaning prior to event • Setup (tables, chairs, equipment, etc.) • Opening facility – Walk-through • Verifications (required licenses, insurance, signage) • Monitor function • Shut down and secure
<p>Post-Event Duties</p>	<ul style="list-style-type: none"> • Inspect facility for damage • Possible follow up with clients • Tear-down of function • Cleanup • Invoicing

Currently, at the Hamilton Civic Museums, coordination and facilitation duties for rental facilities are fulfilled by staff from the following sites:

- Stable at Whitehern: Whitehern Historic House & Garden staff
- Coach House at Dundurn: Dundurn National Historic House staff
- Ancaster Old Town Hall: Fieldcote Memorial Park & Museum staff
- Nash-Jackson House: Battlefield House Museum & Park staff

- Woodshed: Hamilton Museum of Steam & Technology staff

In the case of a restored and adaptively re-used Auchmar, the duties related to coordination and facilitation of its multi-use programming space (e.g. meetings and facility rentals) would be fulfilled by staff from Tourism and Culture. Staff requirements would be directly dependent on the quantity and type of facility rental bookings.

This plan assumes one additional staff person responsible for the marketing, sale and fulfillment of all community, public, and private uses as outlined above. This would be initially a part-time position but expanding as revenue and associated costs and workloads increase. A limited number of site monitors (to oversee weekend and evening programming) will be required on a part-time 'on call' basis.⁵

Staffing – Facility Operations Maintenance

For all of the HRM sites (including Auchmar in its current state), the site operations/maintenance role is currently implemented by the Heritage Facilities Supervisor. It is expected that this role would continue to be fulfilled by that staff person should Auchmar become a multi-purpose adaptive use facility. In practice, this means:

- conducting monthly inspections with Auchmar staff
- planning maintenance needs and schedules
- coordinating with suppliers and inspectors.
- negotiating contracts for snow and garbage removal, grounds maintenance and general repairs
- monitoring the maintenance budget

⁵ In coordination with other City Departments, HRM staff is selecting an Integrated Management System/Point of Sale application. This may allow the coordination and facilitation duties for all HRM rental and programming facilities to be centralized to a single coordinator position across the Section. This would allow the staff costs for this function to be assigned on a 'pro-rated' across the individual sites, reducing the net municipal levy requirements for Auchmar.

Proposed Room and Space Usage

The room usages/allocations shown here are tentative and subject to dramatic change throughout the design, construction, and restoration phases. They are intended to:

- Guide design.
- Assist in the development of revenue and expense projections.
- Provide a scope for the anticipated interventions to the heritage resources.

Main House

The Auchmar Main House is proposed as a multi-purpose programming space (for community, public sector and private rental use) and office space for not-for-profit groups.

Basement (all rooms)

- Storage
- Mechanical
- Commercial filming and photography
- Specialist tours

Main Floor

All rooms

- Commercial filming and photography
- Tours (in-person and/or mobile phone connected)

Room 101/102⁶

- Large Reception Space

Room 106

- Small meeting/seminar/reception space
- Temporary community exhibit space

Room 107/108/109

- Entrances and Foyer
- Possible passive interpretive panels

Room 112/113/114

- Cloak room
- Facility Attendant work space

Room 110/115

- Large Reception Space

Room 116/117

- Possible location for elevator (on exterior)

Room 118

- Small meeting/seminar/reception space
- Temporary community exhibit space

Room 121

- Small meeting/seminar/reception space

⁶ See the Architectural Drawings section at the end of this report for the room numbering system.

- Temporary community exhibit space

Room 126

- Caterer's plating space
- Pass through to Room 121

Room 128/129

- Caterer's Preparation Area

Room 131/134

- Janitor's Closet or Cloakroom

All other Rooms

- Halls, assembly spaces, unused
- Passive interpretive panels
- Probable fire separations in Rooms 105 and 120

Second Floor

Note that if the Chapel is retained (Option B below), the second floor of the main house will be left undeveloped. It will not be used by staff or the public for the foreseeable future.

Room 203/206/208

- Office 1

Room 201/204/207

- Office 2

Room 209

- Washrooms

Room 210

- Storage and photocopier

Room 211/213/217

- Office 3

Room 212

- Elevator and Janitor's closet

Room 219

- Office 4

Room 202 and 218

- Fire separation

Room 220-229

- Possible Tenant/Intern apartment (short term)
- Bridal Party Dressing Room

New Construction

- Accessible ramps to be installed to connect to front entrance, to be screened by landscaping.

Carriage House

The Carriage House is proposed as an office space for commercial rental.

Ground Floor

- Offices

Dovecote and Garden

- Restored for passive use
- Community programming

Chapel and Dormitory

- Option A
 - Removed with space available for outdoor programming
 - Small scale permanent interpretive programming/outdoor exhibit on footprint of former structures to recognize and communicate history of site as religious centre.
 - New construction of 'Atrium' on north façade of main house (designed and finished to complement the heritage exterior) to contain all washrooms and facility equipment storage (chairs and tables etc.). Will include elevator to provide access to second floor of main house
- Option B
 - Removal of dormitory
 - Retention and restoration of Chapel as programming and interpretive space
 - Renovation of 1960s kitchen, dining room, washrooms and meetings rooms for services related to receptions, workshop and programming.

Grounds

- Restored for passive and outdoor event use.

Revenue Analysis

The City of Hamilton owns and operates cultural sites that provide distinctive settings for social, corporate and community gatherings and events. The Hamilton Civic Museums have rented their facilities (in whole or in part) to the public for 50 years. Many of these sites feature unique architectural details, inviting green spaces and tended gardens. In recent years, with refinements of procedures and programmes, this has proven to be both financially very successful and well received by the public. A balance has been achieved between public access and private rentals.

It is not always straightforward to demonstrate the profitability of these operations because it can be difficult to separate the costs of rental facility from the site as a whole. What percentage of snow removal at Dundurn should be allocated to the Coach House operation as opposed to Dundurn itself or the Hamilton Military Museum that share the parking lot?



Artist Concept of a restored Auchmar Estate with the Chapel and Dormitory retained and the Dormitory removed

Experience Gained

While many HRM Section revenue-generating programs have been successful, there have been some challenges. The Section has benefited from the extensive experience and lessons have been learned.

Restaurant Operation

Food services in historic sites and museums are, at best, a mixed success. While some are financially successful, many sites across Canada deliberately operate them at a loss as a visitor service. Attempts have been made to operate a restaurant at Dundurn National Historic Site since at least the 1960s. A variety of models have been used: direct operation, private operators leasing the premises, private operators under contracts. Few have been successful in the short term and none over the long term. In fact, the only profitable food service at Dundurn was a summer-long hot dog stand in the 1980s.

There are several reasons for the consistent failure and a full analysis is a report in itself. Just this sort of analysis was conducted in 2007 and the results led to the closure of the Coach House Restaurant at Dundurn in 2008. Briefly, the various incarnations were too small and too remote from potential markets to be sustainable. A high end restaurant that would attract customers from a downtown is too expensive or selective for the average museum goer with his/her family. Such an operation can work in concert with a successful full service conference/reception business. For a discussion of the viability of that option, see below.

Full Service Conference/Reception.

For about a decade from the late 1990s through the late 2000s, Dundurn operated a full service catering operation for weddings and receptions of various kinds. While revenues were generally very solid (peaking at close to \$400,000 per year), and food costs well below the industry standard, the operation never showed a deficit of less than \$60,000/yr and generally ran deficits over \$100,000/yr. The operation was closed in 2007.

Again, this can be understood in various ways. In essence, again, the facility was too small to match the overheads inherent in the operation. The Coach House is a small

venue (maximum 80 people). Lower end receptions do not cover costs and higher end (and profitable) events are too infrequent.

The goal of the Coach House operation had been to use the revenue from the restaurant to support the activities of the museum. In reality, the reverse occurred: the successes of the museum supported the shortfalls of the restaurant.

During the years when Dundurn struggled to make the Coach House support itself, the trend was to increase the high yield programming (receptions etc.) at the cost of high public access programs. Community groups and school programs were consistently 'bumped' from the Coach House multi-purpose space to make way for higher paying private rentals. As one member of public program staff noted at the time: "when do we get our building back?"

Murder Mysteries

For several years, Dundurn offered a dinner theatre type event, involving tours of the Castle and dinner and a play in the Coach House. These were very well received and met their revenue targets. However, the market for this kind of event is fairly small and is easily saturated. As an occasional offering, it was sustainable but it had little overall impact on the viability of the Coach House.

Bus Tours

For many years, bus tours were steady and reliable sources of visitation and income for museums. At peak times (e.g. Christmas), Dundurn and Battlefield could receive as many as 10 buses a week. This was not unusual for historic sites of similar size.

Buses were much sought after (and the Hamilton Civic Museums actively marketed in this area) because they were high revenue programs with relatively known costs. The gift shop, the historic house and the restaurant cost centres all benefitted.

The original business plan for the Coach House Restaurant was based on 100 bus tours annually to offset the overhead of operating a full service restaurant and reception facility. The Coach House partnered with various other institutions (in particular, the Royal Botanical Gardens) on full day packages.

Beginning after 2000, however, and in the wake of the SARS crisis, the market for bus tours began a sharp and, for the time being, permanent decline. In part, this reflects a demographic and generational change where seniors (the main client) have become more independent travelers. Also, the rise of the gaming industry has meant that bus tour operators themselves are focusing on servicing casinos.

The bus tour industry survives in some high tourist destinations (such as Toronto and Niagara) but is still a much reduced source of visitation for museums.

Implications for Auchmar

The lessons learned can be applied to the program development and business plans for Auchmar. Although somewhat larger than other meeting reception spaces in the HRM portfolio, Auchmar is still too small to support a full service restaurant/conference facility. Such facilities rely on high volumes and large events to achieve economies of scale. Auchmar would not reach this threshold without significantly limiting community and public sector programming.

In a related point, larger receptions (such as weddings) have additional risks. The risk of damage to the heritage site is elevated. Cleaning and maintenance costs are high relative to other programs. Smaller social and corporate events do not have these concerns and are the preferred option.

Comparators

For the purpose of this revenue analysis, the following three venues are being compared with Auchmar: the Stable at Whitehern, the Coach House at Dundurn, and Ancaster Old Town Hall. As comparators, they were selected due to their similar size, functions and capacities and because the revenue data is known with precision.

In 2015, Hamilton Civic Museums' total earned revenue (all sites) was \$600,000, not including grants or transfers. Roughly, 50% of earned revenue comes from non-core programming. This includes rental revenue from indoor and outdoor facilities (wedding ceremonies, receptions, corporate meetings, etc.), alcohol consumption surcharge fees, photo permits, and film shoot fees.

Rates – Rental Venues

The table below shows the rental rates for the three venues being used as comparators and the proposed comparable fees for Auchmar. Rental rates are approved by Council and listed in the annual User Fee Bylaw. (Note: A \$500 surcharge fee applies to any rental involving alcohol consumption.)

Location	Capacities			Rental Rates (Approved for 2014) ⁷					
	Area (sq. ft.)	Banquet (seats)	Theatre (seats)	Half Day	Full Day	Evening	Photo Permit	Grounds	Outdoor Event
Stable at Whitehern	525	NA	40	\$200	\$250	\$300	\$170	\$360	\$360
Coach House at Dundurn	1,610	72	120	\$300	\$400	\$600	\$170	\$560	\$560
Ancaster Old Town Hall	1,120	90	120	\$250	\$350	\$350	\$170	\$170	\$170
Auchmar Grounds							\$170 (proposed)	\$560 (proposed)	\$560 (proposed)
Auchmar (Rm 110/115)	727	40 (est)	60 (est)	\$350 (proposed)	\$600 (proposed)	\$800 (proposed)	\$200 (proposed)		
Auchmar (Rm 101/102)	664	40 (est)	65 (est)	\$350 (proposed)	\$600 (proposed)	\$800 (proposed)	\$200 (proposed)		
Auchmar (Rm 118)	310	25 (est)	35 (est)	\$300 (proposed)	\$400 (proposed)	\$600 (proposed)	\$200 (proposed)		
Auchmar (Rm 106)	325	25 (est)	35 (est)	\$300 (proposed)	\$400 (proposed)	\$600 (proposed)	\$200 (proposed)		

Fees for the rental of facilities are considered a non-core mandate program for the Hamilton Civic Museums. As such, fees are designed to match or exceed those of similar facilities within the market based on regular environmental scans. Rates are assessed against the full direct and indirect costs to the museum for offering the service. This includes the full staff costs (for set-up and cleaning, administering and

⁷ Rates do not include HST. Rates are approved annually by Council and included in the User Fee By-Law.

monitoring of the rental) and any associated materials or contractual costs (for example, additional contract cleaning).

If the market-based fee (i.e. price) exceeds the costs, the site offers the service. If not, the service is not made available. The goal is to generate funds in excess of costs in order to reduce the municipal levy and to subsidize core programming.

That said, the facilities operated by Hamilton Civic Museums are public facilities and consideration must be given to ensure public access to local heritage. As a result, some subsidies do exist. Not for profit organizations (including other City departments), receive a 50% discount on most facility rentals.

In addition, all museums and historic sites partner with community groups on joint projects and programs. Museum staff negotiates memorandums of understanding with these organizations to ensure fairness and equity on all sides. Typically, partner organizations receive free access to the rental facilities for their meetings or events in return for participation in events and other activities. The co-ordination of schedules, security, and maintenance remains the responsibility of site (museum) staff.

Rates – Film Shoots

Rates for film shoots are based on location shoot fees and staff requirements. Film shoot rates are approved by Council and are listed in the annual User Fee Bylaw. As a non-core program, the fees are set at market rates. The table below outlines these rates.⁸

Commercial Film Rates, Hamilton Civic Museums and Heritage Facilities	
Exterior Filming Rate per location per day (including set-up, shooting and take-down days)	\$500/day

⁸ The level of interest in Auchmar as a location encourages the view that a premium could be charged for filming there. For the purposes of this report, existing rates are applied but they should be viewed as the minimum.

Film Shoot Revenues and Bookings								
Site	2015		2014		2013		2012	
	Revenue	Bookings	Revenue	Bookings	Revenue	Bookings	Revenue	Bookings
Stable at Whitehern	\$2,236	5	\$2,321	3	\$0	0	\$2,300	2
Coach House at Dundurn	\$31,834	7	\$58,521	3	\$11,460	1	\$6,046	1
Ancaster Old Town Hall	\$3,608	1	\$150	1	\$0	0	\$0	0

Interest in Auchmar as a potential film shoot location already exists. Auchmar has been used as a location for interior and exterior filming periodically since it was purchased by the City in 1999. In recent years, the site has not been available for that use due to construction. At this time, these restrictions should be removed by the end of the 2016 construction season.

Revenue Potential – Educational and Cultural Programming

Roughly, 200,000 people visit the Hamilton Civic Museums each year for a variety of public tours, events, school and community group programs, exhibits, and workshops. Some of the events are offered free. However, roughly 50% of annual earned revenue (not including grants and transfers) comes from this 'core' programming. For example, in 2015, the Hamilton Civic Museums earned approximately \$301,654 from educational and community programming. This is a not inconsiderable sum and some level of programming will, no doubt, be developed and implemented for Auchmar as well.

However, the level of this programming will need to be established as part of a more complete site heritage presentation plan. At this time, it is not expected that Auchmar will generate significant visitation or revenue from this source.

Providing school, community, event, and education programming is a core mandate for the Hamilton Civic Museums. This kind of programming tends to be very staff and resource intensive and represents the bulk of the operating budget. Fees are set as low as possible to encourage all Hamiltonians to access their heritage.

Therefore, Council-approved rates are established to cover only the direct hourly staff wages and material costs of each program. Whether events are fee-based or donation-based, the goal is to cover the direct hourly staff wages and program costs (e.g. materials, any performance fees, security, sound systems, etc.). Other costs (e.g. overhead and other staff costs) are “subsidized” by the municipal levy or by fees for non-core programming.

In practice, Hamilton’s Civic Museums charge approximately \$2.00 to \$3.00 per hour per student (depending on the cost of materials required) for a school program. General admission rates vary significantly across the system from \$5.00 for children at some sites to \$30.00 for a family at Dundurn. Indirect and overhead costs (e.g. cleaning time, administrative or planning time, utilities, etc.) are “subsidized” by the municipal levy or by fees from non-core programming.

Revenue Potential – Community Organizations Tenant Leases

The 2012 Proposed Use Concept Profile for the Auchmar Estate, received by Council (and the basis for this Operational Plan), identified the potential for leasing parts of the main house to community groups as office space. This concept is in place at several heritage facilities under the stewardship of the HRM Section (Tisdale House, Hammill House and the Veevers Estate). While the actual terms of the leases vary, the spaces are leased at nominal rates (typically \$1-2/yr) The Plan assumes that the Auchmar Adaptive Re-use would follow a similar plan and the facility would derive no significant revenue from this source.

Commercial office rental rates in Hamilton are in the range of \$22 per sq.ft. gross.⁹ Based on approximately 3000sq.ft of rentable space on the second floor of Auchmar, and the Coach House, subsidizing community group office rental rates (at \$1-2/yr) represents as much as \$60,000/yr of deferred revenue. In practical terms, real deferred revenue is much less. The location and space are less than ideal and some vacancy rate is inevitable.

It is best to view this deferred revenue figure as part of the subsidy required to allow community and public sector functions to exist and succeed.

⁹ Telephone correspondence, Glen Norton to Carolyn Samko 16 June 2015

However, an opportunity exists to create an office space in the Coach House. Originally, this space was considered for either not-for-profit lease or use as a curatorial/workshop facility. On the other hand, this space could be made available to for-profit operations (e.g. professional office). A projection for tenant revenue has been included in total revenue projection below.

Projected Revenue

Annual rental revenue (2015) for the three comparator sites ranges from \$22,000 for the smallest site (Whitehern) to \$66,000 for the largest site (Dundurn). It is reasonable to conclude that Auchmar could generate revenue outside this range because:

- Auchmar has more interior spaces for social, community or corporate programming rental.
- Auchmar is the only site where it would be feasible to operate several outdoor events or a combination of outdoor and indoor events simultaneously.
- Auchmar has fewer competing programming requirements (i.e. it is not a functioning museum/historic site which must be available for general public access on a regular basis at reasonable times).
- Auchmar would be one of only two heritage facilities within the portfolio (Balfour/Chedoke being the other) that would permit interior commercial filming and photography.

Projected Operating Revenue – Auchmar				
Expense Description	Year 1	Year 2	Year 3	Year 4
Social Functions				
Wedding Photography	\$ 5,000	\$ 6,010	\$ 6,937	\$ 7,882
Wedding Ceremonies	\$ 7,350	\$ 19,089	\$ 28,563	\$ 28,848
Receptions	\$ 15,000	\$ 12,625	\$ 15,302	\$ 15,455
Tours	\$ 1,250	\$ 1,250	\$ 1,250	\$ 1,250
Corporate Functions				
Seminars/Retreats	\$ 5,000	\$ 7,575	\$ 7,575	\$ 10,201
Tours	\$ 1,250	\$ 1,250	\$ 1,250	\$ 1,250
Commercial Film Production	\$ 15,000	\$ 30,300	\$ 30,909	\$ 37,091
Community Use				
Meetings	\$ 7,500	\$ 6,313	\$ 7,651	\$ 7,727
Special Events	\$ 500	\$ 500	\$ 500	\$ 500
Workshops/Other programming	\$ 500	\$ 500	\$ 500	\$ 500
Office Lease	\$ 22,000	\$ 22,000	\$ 22,000	\$ 22,000
Public Sector Use	\$ 7,500	\$ 6,313	\$ 7,651	\$ 7,727
Sponsorship/Fundraising	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000
TOTALS	\$ 88,850	\$ 114,724	\$ 131,087	\$ 141,431

Operating Expenses

Comparators

For the purpose of this operating expenses analysis, this study will compare three relatively similar sized heritage sites: Dundurn National Historic Site, Battlefield House Museum and Park and the Hamilton Museum of Steam and Technology. All three have multiple buildings, comparable total square footage and large surrounding grounds which are used for various public, community and private events. In addition, we will compare operating expenses for all Hamilton Civic Museums collectively. This will provide a good general guide to the likely parameters shaping the development of an operating budget.

Staff Expenses

For other facilities in the HRM portfolio, staff costs related to venue and film shoot coordination and facilitation are incurred as the venues are rented and are directly proportional to each other. For this reason, these types of staff requirements are on an as-needed basis (fulfilled through an existing staff pool) and, typically, a small surplus is generated. Revenues obtained through operating cost surpluses fund other programming (e.g. educational and school programming) in the Hamilton Civic Museums' portfolio.

The draft operating budget below will include an additional staff person (initially .25FTE but growing to .5FTE over the first 4 years) for facility and event coordination. This individual will be dedicated to the Auchmar facility and will be responsible for the daily oversight and event delivery.

In essence, if there are no bookings and no revenue, there is also no staff expense.

Staff costs related to venue operations maintenance is already incorporated in an existing FTE that is responsible for operations maintenance for all of the Hamilton Civic Museums sites. It is anticipated that there will be no additional increases (in the short to medium term) to the yearly FTE requirement related to facility operations maintenance.

Marketing Expenses

The marketing function for the heritage facilities is centralized within the Cultural Initiatives Section of the Tourism and Culture Division. Costs related to creating the corporate and social venue rental advertising and marketing amount to an average of \$4,000 per venue per year for all facilities in the portfolio. If Auchmar is added, only nominal additional increases to the yearly operating expenses related to marketing costs are anticipated.

Function/Event Expenses

The vision for private and community programming at Auchmar emphasizes low impact and smaller scale operations. The smaller scale programming reduces the facilities operations expenses. Nevertheless, some allowance is included in the proposed budget for:

- Linen and dry cleaning
- Some equipment rentals (e.g. specialized AV, non-standard tents)
- Equipment replacement (tables, chairs etc.)
- Facility cleaning (a contracted service)

These expenses rise in direct relation to, and are offset by, the level of programming (and revenue).

Summary of Maintenance Expenses

The following tables list a summary of maintenance expenses for the three comparable sites and the Heritage Resource Management sites as a whole.

Hamilton Museum of Steam and Technology						
		2015	2014	2013	2012	2011
Category	Account	YTD Actuals	YTD Actuals	YTD Actuals	YTD Actuals	YTD Actuals
		\$ 52,369	\$ 39,562	\$ 32,287	\$44,653	\$ 41,414
BUILDING AND GROUND		\$ 50,113	\$ 37,452	\$ 29,166	\$40,561	\$ 36,413
	54430: Materials	\$3,878	\$ -	\$ -	\$ -	-\$ 3,817
	54435: Painting	\$1,207	\$ -	\$ -	\$ -	\$ 81
	54443: Repairs-Alarm System	\$0	\$ 146	\$ 943	\$ -	\$ 960
	54605: Building Cleaning	\$2,453	\$ 6,216	\$ -	\$ -	\$ -
	54606: Carpet Cleaning	\$5,470	\$ -	\$ -	\$ -	\$ -
	54680: Window Cleaning	\$0	\$ -	-\$ 21	\$ -	\$ 1,209
	54801: Grounds Maintenance	\$1,685	\$ 6,130	\$ 2,052	\$ 4,671	\$ 1,018
	56091: Garbage Collection	\$4,333	\$ 5,153	\$ 2,153	\$ 2,113	\$ 1,360
	56120: Hydro	\$21,108	\$ 14,017	\$ 16,058	\$13,873	\$ 16,277
	56180: Water & Sewer	\$3,649	\$ 2,274	\$ 5,519	\$16,758	\$ 16,399
	56202: Security	\$6,330	\$ 3,515	\$ 2,461	\$ 3,146	\$ 2,927
CONTRACTUAL		\$ 712	\$ 679	\$ 204	\$ 1,141	\$ 1,141
	55310: Equipment Lease/Rental	\$0	\$ 380	\$ -	\$ -	\$ -
	55916: Contractual Services	\$0	\$ -	\$ 158	\$ 712	\$ 712
	55944: Pest Control	\$712	\$ 299	\$ 46	\$ 429	\$ 429
COST ALLOCATIONS		\$ -	\$ -	\$ -	\$ -	\$ -
	59043: C.A. - Horticulture	\$ -	\$ -	\$ -	\$ -	\$ -
FINANCIAL		\$ -	\$ -	\$ 317	\$ 692	\$ 960
	55744: Inspection Fees	\$ -	\$ -	\$ 317	\$ 692	\$ 960
MATERIAL AND SUPPLY		\$ 1,544	\$ 1,431	\$ 2,601	\$ 2,259	\$ 2,900
	53051: Operating Supplies	\$0	\$ 618	\$ -	\$ -	\$ -
	53059: Cleaning Supplies	\$585	\$ 712	\$ 1,754	\$ 2,004	\$ 2,809
	53430: Medical/Safety Equipment	\$934	\$ -	\$ -	\$ -	\$ 91
	54345: False Alarm Expense	\$0	\$ 75	\$ -	\$ -	\$ -
	54728: Fire Equipment Repair	\$0	\$ 25	\$ 20	\$ 255	\$ -
	54740: Repairs & Maintenance-Plumbing	\$25	\$ -	\$ 827	\$ -	\$ -

Dundurn National Historic Site						
		2015	2014	2013	2012	2011
Category	Account	YTD Actuals	YTD Actuals	YTD Actuals	YTD Actuals	YTD Actuals
		\$102,458	\$ 107,227	\$ 91,935	\$74,644	\$ 84,152
BUILDING AND GROUND		\$ 87,669	\$ 76,496	\$ 82,491	\$61,936	\$ 68,517
	54401: Building Repairs	\$694	\$ 5,597	\$ -	\$ -	-\$ 100
	54412: Elevator/Escalator-R&M	\$116	\$ 464	\$ 382	\$ -	\$ -
	54435: Painting	\$0	\$ 4,000	\$ 534	\$ -	\$ 260
	54443: Repairs-Alarm System	\$0	\$ -	\$ -	\$ 3,729	\$ 2,305
	54445: Repairs-Electrical	\$188	\$ 947	\$ -	\$ -	\$ 670
	54605: Building Cleaning	\$700	\$ 292	\$ 294	\$ 368	\$ 1,326
	54606: Carpet Cleaning	\$0	\$ 150	\$ -	\$ 203	\$ 148
	54680: Window Cleaning	0	\$ -	\$ -	\$ -	\$ 610
	54801: Grounds Maintenance	\$16,786	\$ 8,917	\$ 21,966	\$ 5,980	\$ 7,118
	56115: Heating Fuel - NG	\$12,342	\$ 14,748	\$ 16,947	\$13,549	\$ 19,462
	56120: Hydro	\$42,150	\$ 29,423	\$ 30,125	\$26,414	\$ 27,622
	56180: Water & Sewer	\$8,970	\$ 6,445	\$ 7,805	\$ 5,674	\$ 7,308
	56202: Security	\$5,723	\$ 5,513	\$ 4,437	\$ 6,019	\$ 1,786
CONTRACTUAL		\$ 3,575	\$ 1,256	\$ 350	\$ 4,438	\$ 4,452
	55916: Contractual Services	0	\$ -	\$ 177	\$ 653	\$ 712
	55926: Elevator Contract	\$1,310	\$ 168	\$ 76	\$ 469	\$ 597
	55944: Pest Control	\$1,188	\$ 860	\$ 97	\$ 3,315	\$ 2,947
	55960: Refrigeration Contract	\$1,078	\$ 228	\$ -	\$ -	\$ 195
COST ALLOCATIONS		\$ 5,739	\$ 22,023	\$ 5,307	\$ -	\$ -
	59043: C.A. - Horticulture	\$5,739	\$ 22,023	\$ 5,307	\$ -	\$ -
FINANCIAL		\$ 295	\$ 100	\$ 1,283	\$ 1,860	\$ 1,410
	52245: Vandalism		\$ -	\$ -	\$ 1,860	
	55748: Licence Fees		\$ -	\$ -	\$ -	\$ 1,310
	55744: Inspection Fees	\$ 295	\$ 100	\$ 1,283	\$ -	\$ 100
MATERIAL AND SUPPLY		\$ 5,180	\$ 7,352	\$ 2,504	\$ 6,409	\$ 9,773
	53051: Operating Supplies	\$0	\$ -	\$ -	\$ -	\$ 1,928
	53059: Cleaning Supplies	\$1,886	\$ 2,331	\$ 2,219	\$ 2,185	\$ 2,086
	53099: Project Management Recovery	\$0	\$ 4,140	\$ -	\$ -	\$ -
	53430: Medical/Safety Equipment	\$336				\$ 894
	54345: False Alarm Expense	\$0	\$ -	\$ -	\$ -	\$ 621
	54728: Fire Equipment Repair	\$1,590	\$ 880	\$ -	\$ 4,224	\$ 448
	54740: Repairs & Maintenance-Plumbing	\$718	\$ -	\$ -	\$ -	\$ 796
	54915: General Maintenance/Repairs	\$650	\$ -	\$ 285	\$ -	\$ 3,000

Battlefield House Museum and Park						
		2015	2014	2013	2012	2011
Category	Account	YTD Actuals	YTD Actuals	YTD Actuals	YTD Actuals	YTD Actuals
		\$ 60,761	\$ 48,774	\$ 47,133	\$ 54,244	\$ 47,997
BUILDING AND GROUND		\$ 38,665	\$ 38,195	\$ 35,889	\$ 45,190	\$ 38,195
	54401: Building Repairs	\$0	\$ 915	\$ 273	\$ -	\$ 118
	54430: Materials	\$0	\$ -	\$ -	\$ -	\$ 355
	54435: Painting	\$0	\$ 655	\$ -	\$ -	\$ 82
	54443: Repairs-Alarm System	\$230	\$ 95	\$ -	\$ 256	\$ -
	54605: Building Cleaning	\$3,890	\$ 763	\$ -	\$ 244	\$ -
	54680: Window Cleaning	\$0	\$ -	-\$ 6	\$ -	\$ 597
	54801: Grounds Maintenance	\$1,402	\$ 14,235	\$ 7,443	\$ 10,913	\$ 9,343
	56091: Garbage Collection	\$292	\$ 297	\$ 442	\$ 336	\$ 520
	55352: Boiler & Water Heater Rentals	\$276	\$ 413	-\$ 1	\$ 46	\$ -
	56115: Heating Fuel - NG	\$4,496	\$ 4,349	\$ 5,683	\$ 3,786	\$ 6,272
	56120: Hydro	\$13,715	\$ 11,776	\$ 11,484	\$ 10,694	\$ 11,287
	56145: Telephone	\$436	\$ 441	\$ 442	\$ 479	\$ 442
	56180: Water & Sewer	\$10,807	\$ 2,632	\$ 6,393	\$ 15,764	\$ 5,921
	56202: Security	\$3,122	\$ 1,623	\$ 3,735	\$ 2,674	\$ 3,259
CONTRACTUAL		\$ 14,198	\$ 4,580	\$ 751	\$ 2,742	\$ 2,213
	55060: Snow Removal	\$13,137	\$ 2,635	\$ -	\$ -	
	55916: Contractual Services	\$ -	\$ 400	\$ -	\$ -	
	55926: Elevator Contract	\$481	\$ 931	\$ 706	\$ 433	\$ 803
	55944: Pest Control	\$581	\$ 614	\$ 46	\$ 2,310	\$ 1,410
COST ALLOCATIONS		\$ 6,473	\$ 3,691	\$ 7,792	\$ -	\$ -
	59043: C.A. - Horticulture	\$6,473	\$ 3,691	\$ 7,792	\$ -	\$ -
FINANCIAL		\$ 163	\$ 100	\$ 1,653	\$ 1,246	\$ 1,117
	55744: Inspection Fees	\$ 163	\$ 100	\$ 1,653	\$ 1,246	\$ 1,117
MATERIAL AND SUPPLY		\$ 1,262	\$ 2,208	\$ 1,048	\$ 5,065	\$ 6,472
	53059: Cleaning Supplies	\$666	\$ 1,007	\$ 590	\$ 375	\$ 1,147
	53445: Operating Equipment		\$ -	\$ 53		
	54345: False Alarm Expense		\$ 675	\$ 100		\$ 100
	54728: Fire Equipment Repair	\$526	\$ 526	\$ -	\$ 4,527	-\$ 322
	54915: General Maintenance/Repairs	\$ 70	\$ -	\$ 305	\$ 163	\$ 5,546

All Section Heritage Facilities						
Category	Account	2015 YTD Actuals	2014 YTD Actuals	2013 YTD Actuals	2012 YTD Actuals	2011 YTD Actuals
BUILDING AND GROUND		\$ 530,160	\$ 625,480	\$ 536,198	\$ 572,078	\$ 589,709
	54401: Building Repairs	\$80,716	\$ 168,155	\$ 162,569	\$ 153,191	\$ 183,268
	54412: Elevator/Escalator-R&M	\$116	\$ 464	\$ 382	\$ -	\$ -
	54430: Materials	\$0	\$ -	\$ 677	\$ -	\$ 2,470
	54435: Painting	\$43,065	\$ 50,823	\$ 39,636	\$ 26,529	\$ 41,035
	54443: Repairs-Alarm System	\$125	\$ 1,316	\$ 3,077	\$ 5,158	\$ 5,672
	54445: Repairs-Electrical	\$62,182	\$ 52,276	\$ 26,337	\$ 82,021	\$ 92,056
	54461: ESA Inspection	\$8,165	\$ 8,067	\$ -		
	54605: Building Cleaning	\$36,608	\$ 39,892	\$ 32,981	\$ 57,732	\$ 20,996
	54606: Carpet Cleaning	\$0	\$ 150	\$ -	\$ 203	\$ 148
	54680: Window Cleaning	\$0		-\$ 29		\$ 2,647
	54801: Grounds Maintenance	\$68,243	\$ 121,757	\$ 74,780	\$ 54,481	\$ 46,974
	55200: Relocation/Renovation Expense			\$ 500		
	56091: Garbage Collection	\$6,300	\$ 1,081	\$ 862		\$ 1,526
	54820: Property Cleanup/Maintenance		\$ -	\$ -		\$ 1,124
	55352: Boiler & Water Heater Rentals	\$683	\$ 5,566	\$ 2,143	\$ 688	\$ 1,902
	56115: Heating Fuel - NG	\$34,189	\$ 39,807	\$ 39,372	\$ 2,159	\$ 48,484
	56120: Hydro	\$120,873	\$ 92,763	\$ 95,424	\$ 34,741	\$ 89,181
	56145: Telephone	\$2,491	\$ 1,486	\$ 1,066	\$ 83,892	\$ 1,067
	56180: Water & Sewer	\$37,380	\$ 23,547	\$ 32,199	\$ 1,151	\$ 38,730
	56202: Security	\$29,023	\$ 18,331	\$ 21,058	\$ 47,610	\$ 17,368
	56203: Police			\$ 3,166	\$ 22,522	
CONTRACTUAL		\$ 69,327	\$ 22,722	\$ 8,222	\$ 902	\$ 12,818
	55060: Snow Removal	\$52,477	\$ 18,224	\$ 402	\$ -	\$ 672
	55926: Elevator Contract	\$1,790	\$ 837	\$ 781	\$ 902	\$ 1,400
	55502: Internet Line	\$1,873				
	55944: Pest Control	\$5,823	\$ 3,433	\$ 5,402	\$ -	\$ 9,116
	55960: Refrigeration Contract	\$7,364	\$ 228	\$ 1,637	\$ -	\$ 1,630
COST ALLOCATIONS		\$ 12,444	\$ 25,714	\$ 13,652	\$ 827	\$ 851
	58902: C.A. - Forestry		\$ -	\$ -	\$ -	\$ 532
	58961: Inactive - C.A. - Roads	\$232	\$ -	\$ -	\$ -	\$ 153
	59035: C.A. - Traffic			\$ 553	\$ 827	\$ 166
	59043: C.A. - Horticulture	\$12,212	\$ 25,714	\$ 13,099	\$ -	\$ -
FINANCIAL		\$ 458	\$ 200	\$ 8,148	\$ 10,131	\$ 9,939
	55748: Licence Fees		\$ -	\$ -	\$ -	\$ 100
	55744: Inspection Fees	\$ 458	\$ 200	\$ 8,148	\$ 10,131	\$ 9,839
MATERIAL AND SUPPLY		\$ 196,519	\$ 143,200	\$ 164,186	\$ 213,203	\$ 170,562
	53051: Operating Supplies	\$5,573	\$ 645	\$ 3,126		\$ 3,438
	53059: Cleaning Supplies	\$5,447	\$ 5,735	\$ 6,849	\$ 5,836	\$ 7,032
	53099: Project Management Recovery		\$ 4,140	\$ -	\$ -	\$ -
	53430: Medical/Safety Equipment		-\$ 180	\$ -	\$ -	\$ 1,015
	53445: Operating Equipment	\$10,208	\$ 835	\$ 388	\$ -	\$ 3,263
	54345: False Alarm Expense		\$ 1,975	\$ 875	\$ 196	\$ 821
	54720: Repairs-Equipment		\$ 236	\$ -	\$ -	\$ -
	54728: Fire Equipment Repair	\$11,425	\$ 9,314	\$ 19,644	\$ 22,373	\$ 16,568
	54740: Repairs & Maintenance-Plumbing	\$11,657	\$ 13,375	\$ 9,162		\$ 42,196
	54915: General Maintenance/Repairs	\$ 21,427	\$ -	\$ 6,978	\$ 13,235	\$ 496
	54950: Repairs/Maintenance-Hvac	\$ 130,782	\$ 107,125	\$ 117,163	\$ 171,563	\$ 96,725
		\$ 808,908	\$ 817,316	\$ 730,406	\$ 797,140	\$ 783,879

Summary and Forecasted Operating Expenses

Annual maintenance expenses are in the range of \$100,000/yr for Dundurn (the largest and most intensely programmed of the sites) to \$52-60,000 per year for Battlefield House and the Steam Museum, giving an average of roughly \$71,000/yr. Another perspective is to look at the total cost of maintenance for all 17 heritage facilities/operations within the HRM portfolio. Over the last 4 years, this has averaged \$800,000/yr or \$47,000 per site. Based on 40 buildings (of all sizes and conditions), the average is \$20,000 per building or, in the case of Auchmar (with 4 structures), \$80,000/yr plus staff costs.

A reasonable conclusion from this limited data is that an adaptive re-use concept for Auchmar could expect to have operating expenses ranging from \$50,000 to \$80,000 per year plus the cost of staffing. Auchmar should benefit from newer and more efficient services (with lower utility costs and fewer repairs). This will be balanced with higher grounds and snow removal costs.

Working from the more conservative of these estimates, this Plan estimates that operating expenses for a fully restored and programmed Auchmar Estate will be \$98,000 (including \$17,000 in staff costs) in Year 1 and \$138,000 (including \$36,000 in staff costs) in Year 4.

Real costs will be entirely dependent on the scale, range and quantity of programming and public use: the higher the public use, the greater the impact on the site and the higher the costs. The higher costs are, naturally, matched with higher revenue. The programming challenge is to ensure that costs do not increase at a rate faster than revenues.

See a detailed projection of these costs below. It is based on data available to date and predicted levels of use. These operating expenses include utilities, cleaning, some related program costs (e.g. linen service, table rental etc.) and grounds maintenance plus staffing costs.

Projected Operating Expenses – Auchmar				
Expense Description	Year 1	Year 2	Year 3	Year 4
Water and Sewer	\$ 4,000	\$ 4,040	\$ 4,080	\$ 4,121
Natural Gas Heating Fuel	\$ 15,000	\$ 15,150	\$ 15,302	\$ 15,455
Hydro Electricity	\$ 20,000	\$ 20,200	\$ 20,402	\$ 20,606
Building Maintenance Repairs	\$ 5,000	\$ 5,000	\$ 7,500	\$ 10,000
Inspection Fees	\$ 1,000	\$ 1,010	\$ 1,020	\$ 1,030
Security	\$ 7,000	\$ 7,070	\$ 7,141	\$ 7,212
Pest Control	\$ 500	\$ 505	\$ 510	\$ 515
Venue Cleaning	\$ 8,000	\$ 10,000	\$ 12,000	\$ 15,000
Telephone/Internet	\$ 1,500	\$ 1,515	\$ 1,530	\$ 1,545
Grounds Maintenance/ Snow Removal	\$ 15,000	\$ 12,000	\$ 15,000	\$ 20,000
Programming and Facility Rental Related Costs	\$ 4,000	\$ 5,000	\$ 6,000	\$ 7,000
Staffing	\$ 17,000	\$ 35,350	\$ 35,704	\$ 36,061
TOTALS	\$ 98,000	\$116,840	\$ 126,188	\$ 138,545

For comparison, the current operating costs for Auchmar, as an unrestored and largely inaccessible site, total approximately \$25,000 per year (for security, minimal heating and lighting, minimal grounds maintenance and repairs due to vandalism).

Annual Operating Expenses and Revenue – Net Municipal Levy Implications

The operational expenses and projected revenues are based on the Use Concept Profile approved by Council in 2012.

Based on the comparator sites, the revenue generated by non-core programming (e.g. various facility rentals) can offset the expenses of administering and coordinating the use of Auchmar (i.e. the variable costs – such as the wages for casual staff to monitor facility uses). The revenue can also offset the fixed annual maintenance expenses (e.g. utilities, grounds and building upkeep).

Cleaning, ground maintenance/snow removal and facility rental costs are variables which increase with site use. These are matched with increases in revenue and do not negatively affect the net budget. Over time, regular preventive maintenance will increase to maintain a standard of good condition. These expenses are not directly affected by site use and may represent a pressure on the budget in later years.

The major variable is staff costs. In theory, growing staff costs are matched by growing revenues. In practice, the transition from a part-time staff person to a full-time staff person represents a 'step function' increase in budget pressure. The transition should be delayed until work demands (from site use) and revenues clearly justify the need.

All operational costs can be mitigated by increasing the private use rental programming and reducing the level of subsidy for (or the quantity of) community and public sector use. Such a change would reduce the level of annual municipal support required but at the expense of public access to and use of Auchmar.

It is also important to note that the annual net operating budget does make allowance for a quantity of regular maintenance and upkeep (e.g. painting, general repairs, masonry upkeep, and eaves trough cleaning). However, it does not make a contribution to reserves for future capital projects or life cycle major maintenance (e.g. roof replacement). This is consistent with the policy applied to other City of Hamilton owned and operated facilities, such as recreation centres, arenas, community centres etc. It is not recommended that Auchmar could achieve a higher self-supporting standard than that achieved by other City facilities.

Fundraising Potential

Staff contracted with KCI, a fundraising and consulting firm, to assess the potential for generating philanthropic funds for the development of the estate as a community cultural facility. Their findings are included as Appendix 1 of the Plan. The consultants were not directed to conduct a fundraising campaign. Rather, they were directed to gather information on the level of support or interest if such a campaign was initiated. In a series of interviews with local community leaders with a history of charitable giving, several concerns were consistently identified.

Participants understood the importance of restoring and enabling public access to heritage properties on a conceptual level. They felt heritage properties, Auchmar in particular, are important pieces of Hamilton's history that should be preserved for future generations. However, they questioned the value proposition of City ownership. They felt:

- An undue burden is placed on the City's operating budget.
- The City does not necessarily have the expertise required to operate such facilities.
- There is limited return on investment with City-owned properties.

Further, participants questioned whether the City:

- Should maintain ownership of the property
- Could demonstrate to potential donors that it has the required business expertise to operate the proposed facilities?
- Could guarantee that either project will be cost effective and will be financially viable for the foreseeable future?
- Has demonstrated the need for the proposed re-purposing of the property been fully researched and verified?

Participants felt securing philanthropic support for Auchmar would be very challenging, particularly at the levels required. When asked about their own potential support, very few would consider a philanthropic gift. Those, who did, spoke of minimal intentions as well as their strong preference that the City either transfer ownership or enter into a public/private partnership. In a similar vein, very few would consider a volunteer role in a proposed fundraising campaign for either project.

In summary, the consultants concluded that a fundraising campaign should establish an achievable target of 3-5% of total capital costs. On that basis, the Operations Plan has included a similarly modest revenue goal from fundraising for annual operations.



Artist Concept of a restored Auchmar Estate with the Chapel and Dormitory removed and a new service wing/atrium constructed

Capital Development, Phasing and Budget

By definition, operations plans are not analyses of capital work. However, in the adaptive re-use of Auchmar, the scale of the capital work will required a phased development process. In this case, capital work will impact operations and some discussion of the capital project is relevant. A detailed analysis of the various capital development projects for Auchmar is included as Appendix 2 to this Plan (Revised Capital Cost Estimate).

The adaptive re-use development could go forward in multiple phases. Each phase will have a capital costs and some phases will have create operational expenses and revenues. The proposed phasing is based on several assumptions and principles:

- Conservation of existing resources is the first priority.
- Open space at Auchmar would be available to the public as soon as possible.
- A daily or regular public presence (either staff or tenants) will be established on as soon as practical, to discourage vandalism.
- As much as possible, the development process will match increases in expenses with increases in revenue potential.

Phase 1 Stabilization.

This phase would complete the stabilization and exterior restoration of the main house, the garden walls and dovecote, and coach house

The estimated cost of this phase is \$3 to 3.6million.

Following Phase 1, the grounds will open to public as open space. Some very limited access to manor house should be possible on open house days. Some limited revenue would be available to the project, largely in the form of outdoor wedding photography and commercial filming. Additional minor expenses, in the form of additional grounds maintenance, should be anticipated.

Phase 2 Tenancy.

This phase would develop a small apartment in the main house for a caretaker or Heritage Restoration Program intern, similar to the procedure in place at Chedoke/Balfour Estate. New water, sewer and electrical and heating systems will be required. The total estimated cost is \$250,000 to \$300,000.

Following Phase 2, no significant additional revenue should be expected, although it may be possible to expand filming and photography somewhat and the presence of the tenant will reduce the staffing costs associated with the programming. Some operating expenses (for heat and other utilities) can be predicted. However, the security of the site will be greatly enhanced and some reductions in vandalism and other repairs should also be anticipated.

Phase 3 Private Use/Offices.

This phase would complete the adaptive re-use of the Coach House as space for a for-profit professional office. The cost for this phase will vary somewhat depending on the specific design but \$600-800,000 is estimated.

As with Phase 2, the completion of Phase 3 will lead to additional operating expenses. Garbage removal, grounds maintenance and snow removal costs will increase. However, it will create a significant new revenue source from the lease of the Coach House space. Revenue to the Auchmar operation would also vary but is estimated to be in the \$20,000-30,000 range based on current commercial rates.

Phase 4 Community Use/Public Sector Use.

This phase would complete the interior restoration of the main house and re-creation of the historic landscape. Within Phase 4, there are two available options.

Option A Removal of Dormitory, Chapel and Service Wing

In this option, the main house interior is restored but the 1960s Sisters of Social Service structures are removed. This would restore the 19th century landscapes and viewsapes. Visitors would be able to see the north face of Auchmar largely as it was originally intended. A new feature, an atrium or conservatory which would wrap around the portions of the north and south facades, and the east façade would be constructed

to contain a range of public services (e.g. public washrooms, catering kitchens etc.). The feature would mimic conservatories which existed on the north and south facades in the late 19th century.

Option B Retention of Chapel and Service Wing, Removal of Dormitory

An alternative option takes notice that, while the 1960s buildings are not protected by heritage legislations, they are not without heritage value. The Sisters of Social Service did occupy the site for several decades and the site is well-remembered by visitors. While the restoration of the original viewscape would not be achieved, retaining some or all of the Sisters buildings would acknowledge the continuum of use and evolution of Auchmar over time.

A restored chapel could be used for conferences and workshops as well as weddings and other functions. The 1960s service wing could be adapted to provide modern washrooms, kitchen facilities and office space. It would also eliminate the requirement for any new construction.

Total estimated cost of either Phase 4 option is \$4.9 to 5.9 million.

Completion of Phase 4 leads to the most significant increase in operating expenses and revenue potential. The Year 1 to Year 4 projections in the Operations Plan, are based on completion of Phase 4.

Phase 5 Estate Walls.

This final phase will complete the restoration of 950 feet of perimeter stone wall. This is a very significant project and is estimated at \$3 to 3.3million.

Phase 5 completion does not lead to any significant expenses or revenue.

Summary and Conclusions

The goal of the Use Concept for the Auchmar Estate, approved by Council in 2012, was initiate a planning process for the adaptive re-use for the heritage site. The assumption underlying the Use Concept was that any adaptive re-use would balance extensive public access and community engagement while minimizing the annual contribution to the operating budget from the municipal levy.

This Operations Plan has developed the concept into a series of proposed programs. Some are programs are intended to enhance the visitor heritage experience and understanding. Other programs are focused on maximizing revenue to reduce the municipal levy. The Plan also considered the impact of the adaptive re-use concept in terms of the protection of Historical, Architectural and Contextual Value.

The current municipal levy impact for the operation of the Auchmar Estate is approximately \$23,000 per year. Based on existing revenue and expenses of comparable programs and operations within the Heritage Resource Management portfolio, it is reasonable to project that this levy impact could be reduced or eliminated in fully-realized Auchmar Estate operation.

The requirement to balance community and public use, participation and engagement with private rental use does restrict the potential for revenue generation and will mean that the facility will only recover annual operational costs. There is limited ability to develop a reserve from major maintenance projects or to offset the development capital costs. All capital work to restore the site to operating condition and any major maintenance and/or capital work in the future will funded through the City's capital budget process.

However, this adaptive re-use will ensure that the Estate is widely available throughout the year for individuals, families, social and community groups to enjoy at nominal, reduced rates or at no cost at all.



City of Hamilton

Strategic Study Report **April 2016**





Project Overview /#3



Themes from Consultations /#5



Overall Assessment /#11

Appendix A: Consultation List /#15

Appendix B: Overview of the Philanthropic Environment /#16

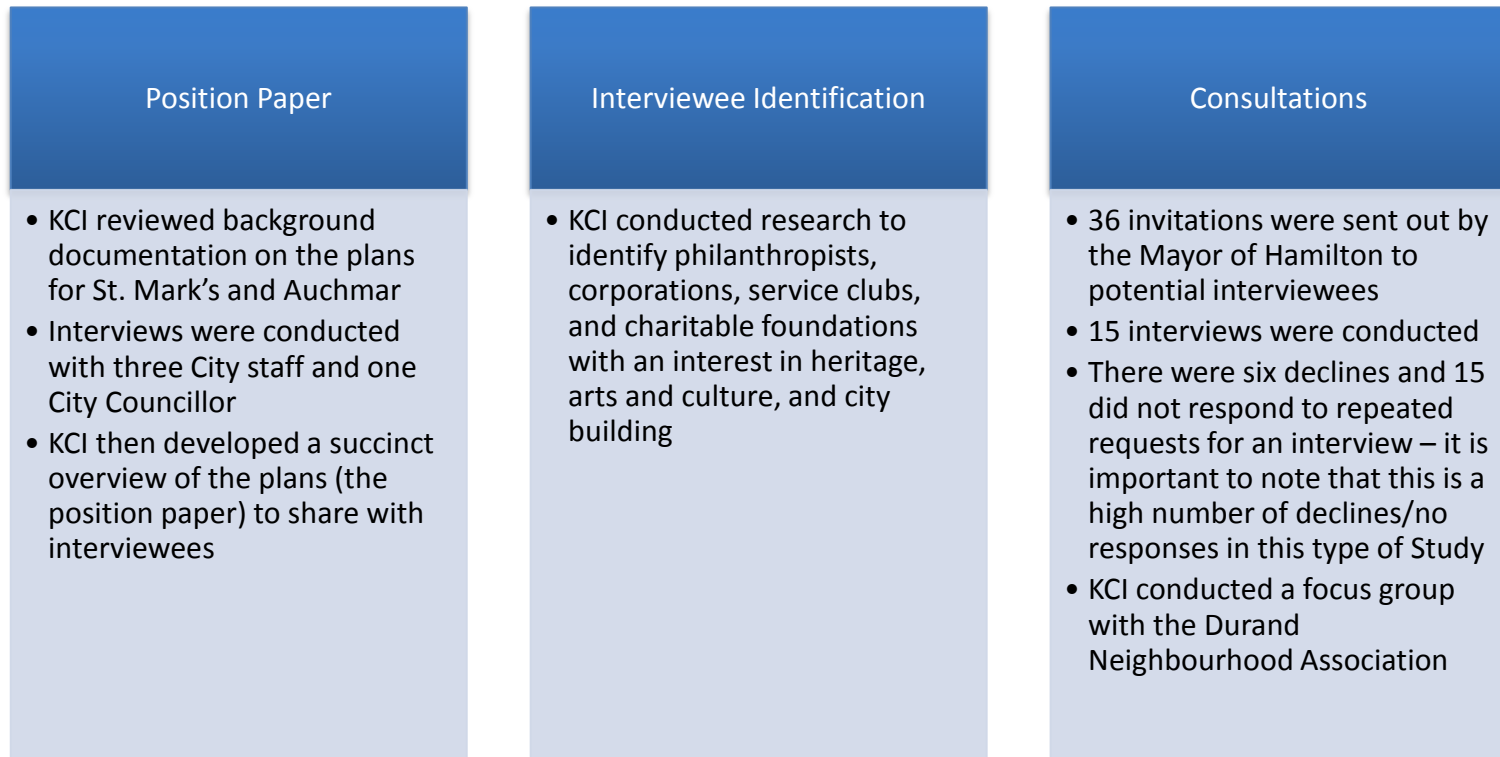
A review of the inputs for the Strategic Study

PROJECT OVERVIEW

KCI was engaged by the City of Hamilton, Tourism and Culture Division, to assess the receptivity of community and corporate leaders to raising philanthropic dollars in support of the restoration and repurposing of the following City-owned properties:

- St. Mark's into a cultural and community centre (\$1.75 million)
- The Auchmar Estate into a conference/meeting centre along with a centre for community programming (\$7.5 million)

The following was undertaken to support the Strategic Study:



**A review of the themes from the personal interviews and
dialogue session**

THEMES FROM CONSULTATIONS

Overall Response to the Proposed Plans

- Participants understood the importance of restoring and enabling public access to heritage properties on a conceptual level. They felt heritage properties, most notably the Auchmar Estate, are important pieces of Hamilton's history that should be preserved for future generations.
- However, all participants questioned the rationale for maintaining City ownership of heritage properties, St. Mark's and Auchmar in particular. They expressed concerns that:
 - This model places an undue burden on the City's operating budget.
 - There is limited return on investment with City-owned properties.
 - The City does not necessarily have the expertise required to operate such facilities.
- Overall, participants strongly favoured a model whereby a private investor is involved to some degree.
- Some participants also suggested the City may wish to consider pursuing funding for both the projects from Federal and Provincial government sources

Response to St. Mark's:

- Most participants felt the green space surrounding St. Mark's is its greatest value. They felt it would be important to preserve the green space and ensure public access, given the scarcity of parkland and open community space in the neighbourhood.
- Participants felt there would be value in either creating or enabling access to community programs in the green space, such as programs for the local public school.
- Little interest was expressed in preserving the building itself. While expressing respect for its history, they did not feel the building had significant architectural value.
- Creating more space for Whitehern did not resonate with participants. They questioned the need for additional programming or exhibition space and sought projected attendance figures to support the rationale.
- Further, participants expressed concern that re-purposing the building with Whitehern as the anchor tenant would be extremely costly because of the property's heritage designation.
- Few participants supported the concept of turning St. Mark's into a community programming/performing arts centre. Most suggested selling the facility to a private investor that could turn it into a viable cultural asset for Hamilton.

Response to the Auchmar Estate:

- The renovation and re-purposing of Auchmar resonated with more participants who acknowledged its value as a heritage property. In addition to being an important part of Hamilton's history, participants spoke of its value in terms of its architecture, natural landscape and potential to drive tourism.
- Participants felt the preservation of Auchmar would appeal to a broader base within Hamilton. However, they did not feel this would translate into the level of philanthropic support required to refurbish and repurpose the facility.
- Many of the participants interviewed did not feel the City should continue ownership of Auchmar. They felt ownership places a heavy financial burden on the City. They also expressed concern the City does not have the necessary skills and expertise to manage the facility in the long-term.
- They suggested the City either sell the estate to a private investor or develop a public/private partnership in which the City maintains ownership of the land and a private entity develops the site and manages and operates the facility.

The following key questions were consistently asked during the consultation process and encompass participants' concerns regarding the two projects:

- Why should the City maintain ownership of the property? What is the value proposition for the City and the citizens of Hamilton to keep this model?
- Can the City demonstrate to both potential donors and the wider community that it has the required business expertise to operate the proposed facilities?
- Can the City guarantee that the development of either project will be cost effective?
- Once developed, how can the City ensure either facility will be financially viable and sustainable for the foreseeable future?
- Has the need for the proposed repurposing of each property been fully researched and verified?
- What are the measurable results and anticipated outcomes of each project?

- Participants felt securing philanthropic support for either St. Mark's or Auchmar would be very challenging, particularly at the levels required.
- Some spoke of the Greater Hamilton Area's very competitive philanthropic sector coupled with what they perceived to be the low priority accorded to heritage projects relative to other causes, most notably healthcare and education.
- When asked about their own potential support, very few would consider a philanthropic gift. Those who did spoke of minimal intentions and felt the proposed campaigns would be a low priority relative to their other philanthropic interests.
- In a similar vein, very few would consider a volunteer role in a proposed fundraising campaign for either project.
- Overall, the majority of participants expressed their strong preference that the City either transfer ownership or enter into a public/private partnership.

An overview of the City of Hamilton's position relative to launching campaigns for St. Mark's and Auchmar

OVERALL ASSESSMENT

In a Strategic Study such as this, there are critical success factors that must be in place (or show signs that they can be in place in the near future) in order to recommend moving forward with a plan to raise philanthropic funds. These include:

- A base of previous donors that are close to the organization/plan and who are invested in its vision
- A robust pipeline of prospective donors, with the capacity to give at significant levels (\$10,000+) and a strong link to/interest in the plans
- Senior volunteer champions who are willing to act as passionate ambassadors of the plan and are willing to commit their own significant financial investment
- An inspiring case that engages potential donors and enables them to readily understand the value proposition of investing in the project
- A sound business plan that accounts for the long-term sustainability of the project

KCI understands that the City of Hamilton is not “in the business” of fundraising and thus does not have a base of previous donors. However, none of the above success factors are evident in this case.

Based on the Study findings, if the City of Hamilton were to move forward with campaigns for St. Mark's or the Auchmar Estate, they would result in minimal philanthropic gifts relative to the amount that needs to be raised. KCI reviewed a number of scenarios, from traditional campaign methodology in which approximately 80% of the money is raised by 10% of donors (i.e. big philanthropic gifts make up the majority of the money required) to implementing a more grassroots approach of seeking multiple gifts from community members, local businesses and service clubs. However, in these scenarios it is very challenging to account for the volume and magnitude of philanthropic gifts required for either campaign.

KCI also took into account the following:

- The Greater Hamilton Area's competitive philanthropic sector, in which a number of significant campaigns and ongoing annual initiatives are backed by compelling cases and the support of senior volunteers.
- The large number of those who either declined to participate in this Study or did not respond to multiple requests. Fortunately, the individuals KCI did speak with are philanthropists and community leaders who are keenly aware of the Greater Hamilton Area's philanthropic sector and were candid and open when offering their insights.

The Study findings indicate that there is not sufficient philanthropic interest to recommend moving forward with campaigns for either St. Mark's or the Auchmar Estate. The low priority accorded by Study participants, coupled with the Greater Hamilton Area's busy and highly competitive philanthropic sector, indicate that fundraising initiatives for either property would result in minimal philanthropic support, likely in the range of 3-5% of what is required.

Considering this response, the City of Hamilton can now determine how to proceed with these properties. Alternative solutions include:

- selling the properties to parties that would maintain their integrity and ideally ensure continued public access
- entering into a public/private partnership whereby the City maintains ownership of the land but transfers the development, management and programming responsibilities to a private investor
- entering into a partnership with a public institution, such as a college or healthcare institution, with a proven track record of managing facilities

Personal Consultations :

- Patrick Bermingham
- David Blanchard
- Terry Cooke
- Brian Decker
- His Worship Mayor Fred Eisenberger
- Councillor Jason Farr
- Don Fell
- Ron Foxcroft
- Don MacVicar
- Joe Mancinelli
- John Marinucci
- Sam Mercanti
- P J Mercanti
- Carl Turkstra
- David Young

Dialogue Session:

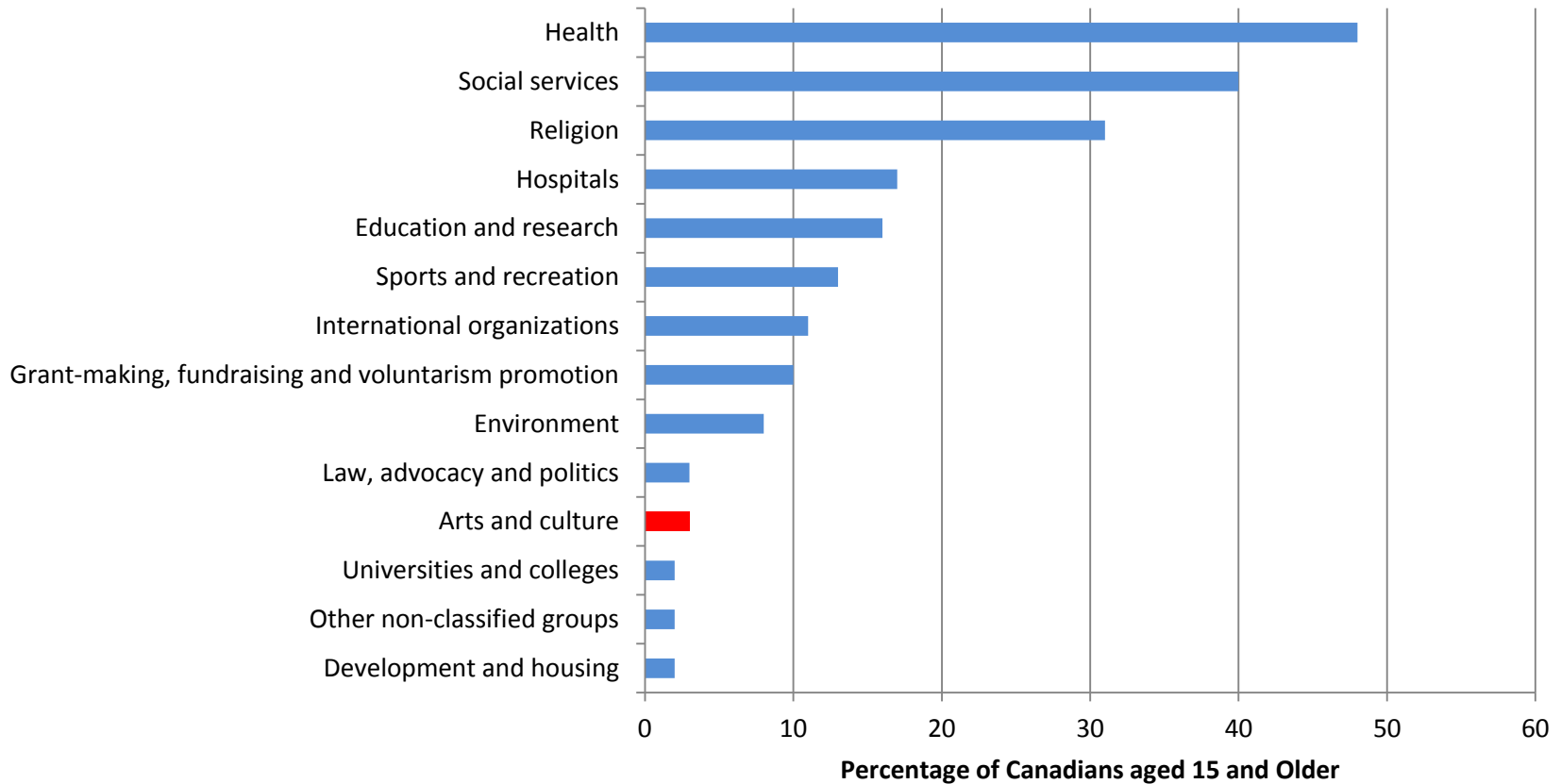
- Janice Brown, Barb Henderson, Frances Murray and Yonatan Rozenszajn

A review of key statistics and data related to the philanthropic sector in the Greater Hamilton Area

OVERVIEW OF THE PHILANTHROPIC ENVIRONMENT

The donor rate (i.e. the number of donors supporting a particular sector) is highest for Health, Social Services and Religion. Arts and Culture (which includes heritage projects) accounts for 4%.

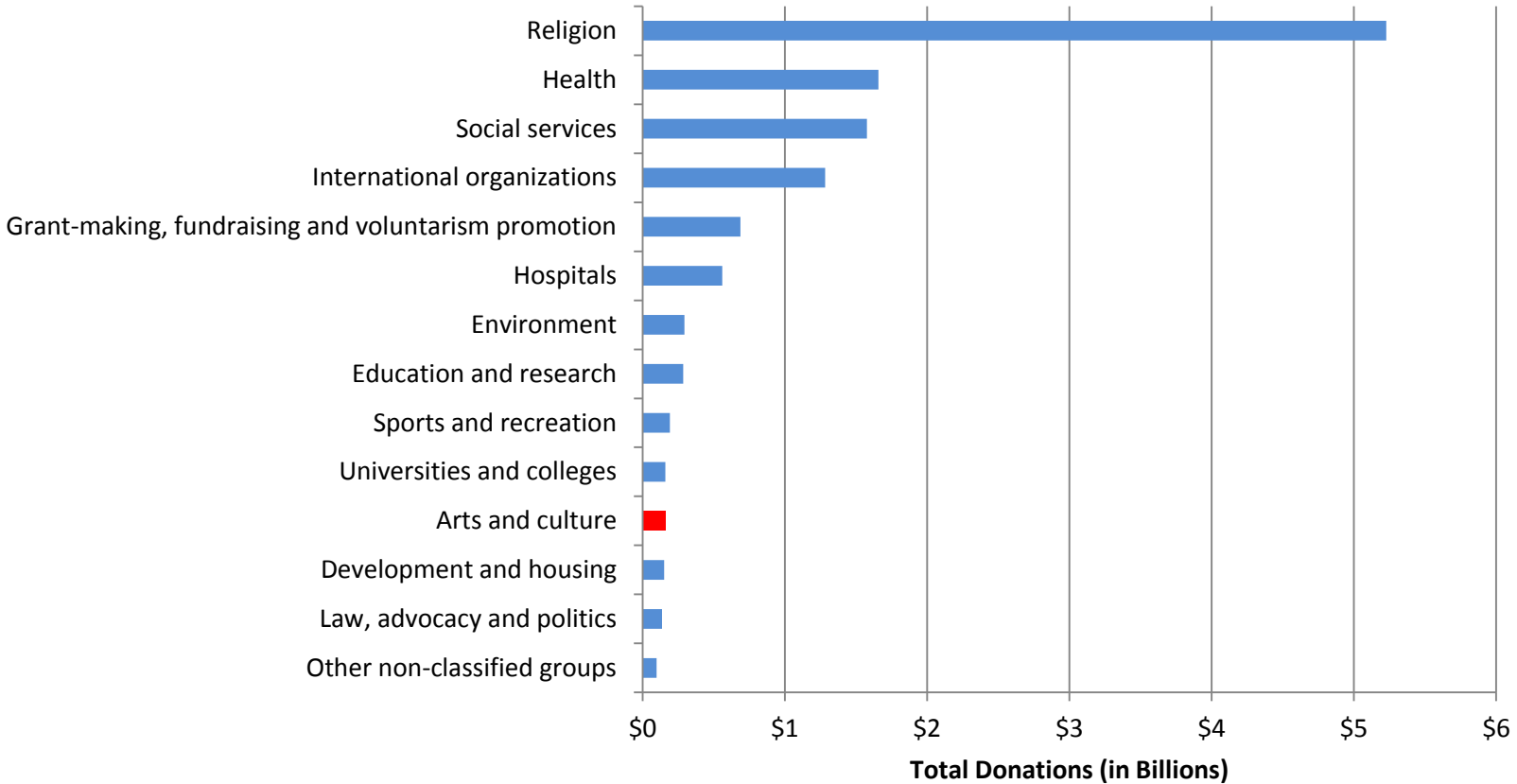
2013 Donor Rate by Charitable Sector



Source: Statistics Canada, 2013 General Social Survey on Giving Volunteering & Participating

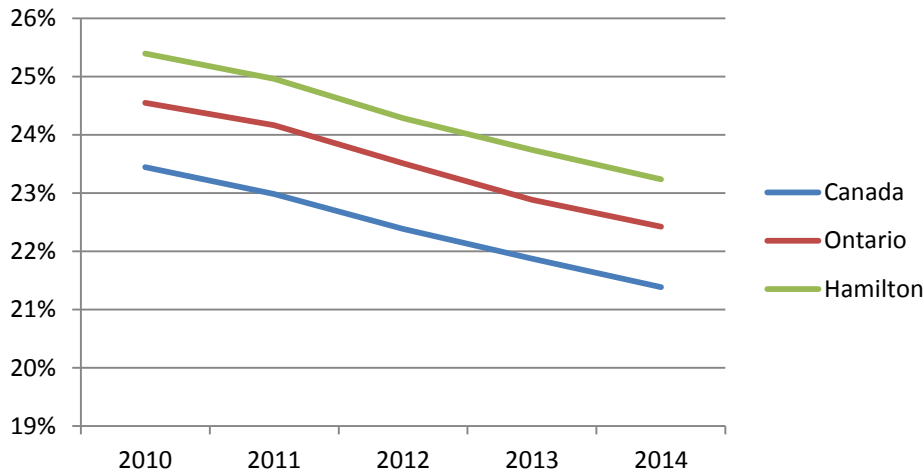
Similarly, the most donations in terms of dollar value is allocated to Religion, Health and Social Services. Arts and Culture accounts for only 3% of total giving.

2013 Total Donations by Charitable Sector



Source: Statistics Canada, 2013 General Social Survey on Giving Volunteering & Participating

% Taxfilers Claiming Donations

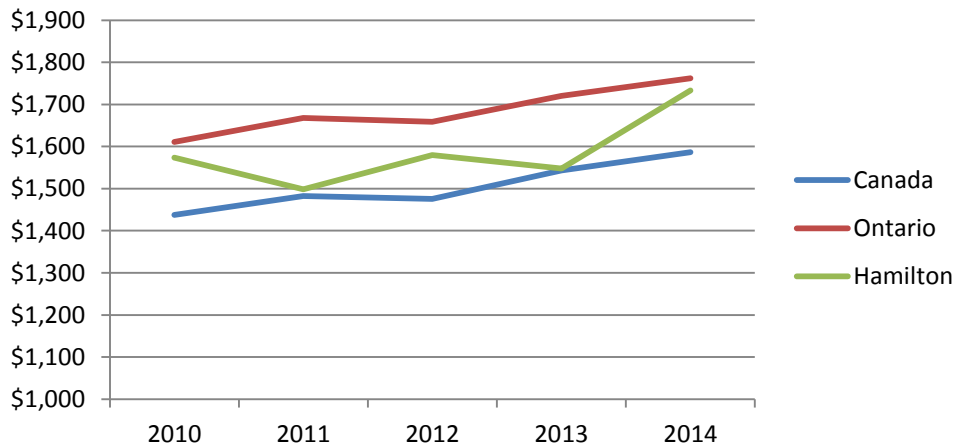


Total 2014 received donations claimed by individuals in Hamilton was **\$217 million** (see graph below).

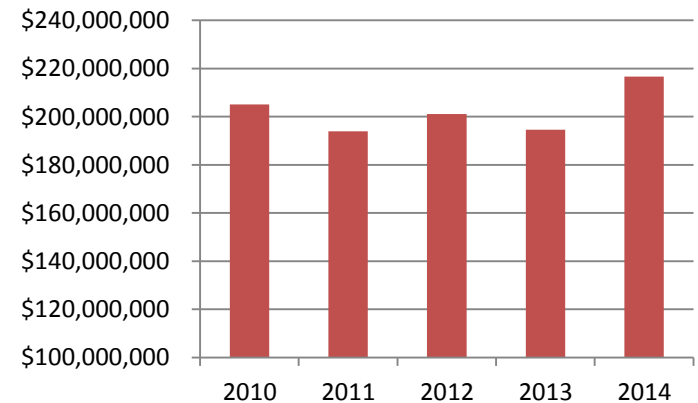
The graphs to the left show the proportion of taxfilers claiming donations, and the average amount claimed for Canada, Ontario, and Hamilton.

The donor rate in Hamilton is strong, with 23% of residents claiming donations in 2014, compared with 22% provincially and 21% nationally. While average donation per donor has been variable in recent years, it is within the average ranges for Ontario and Canada.

Average Donation per Donor

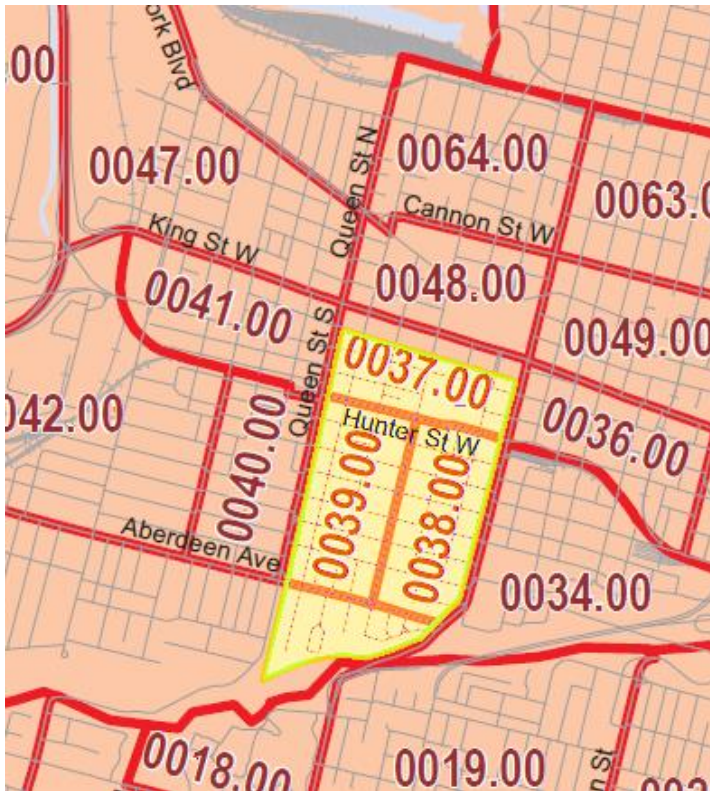


Total Charitable Giving in Hamilton



Source: Statistics Canada, CANSIM Table 111-001, 2014 Individual Taxfiler Data

KCI delved deeper into giving stats for the Durand neighbourhood, since this project would most likely appeal to individuals, businesses and other funders with a link to the neighbourhood.

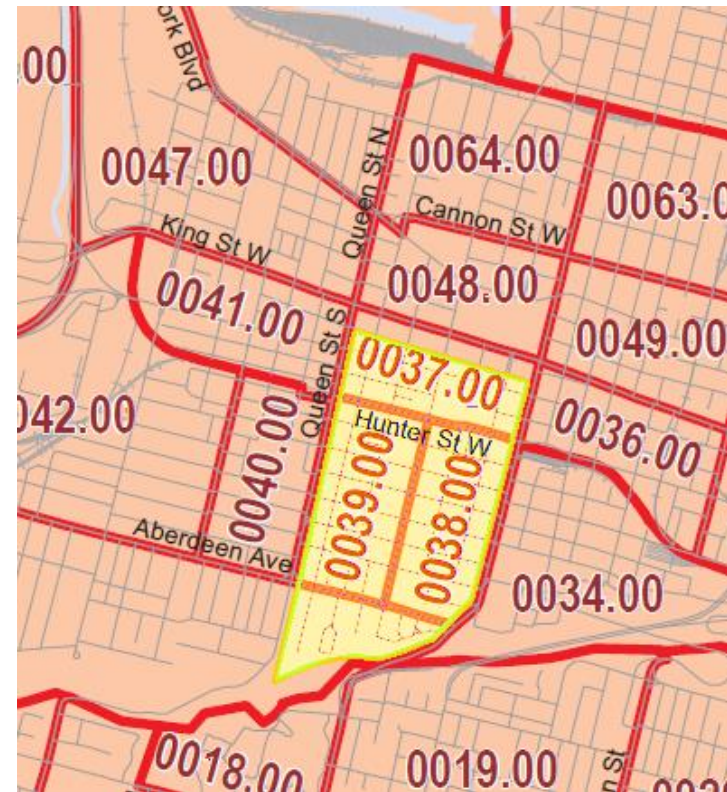


*Hamilton, ON
Durand neighbourhood indicated in yellow*

- The Durand neighbourhood (including tracts 0037, 0038, and 0039) has total charitable giving of \$3,375,000.
- The neighbourhood has a donor rate of 19%, lower than the Ontario-wide average of 22%.
- Average giving for the neighbourhood, however, is higher at \$2,192 compared with \$1,762 for Ontario.

Source: Statistics Canada 2014 Charitable Donor Data

- Average giving in the neighbourhood is buoyed by tract 0038, entirely within the Durand neighbourhood, which has average giving of \$3,027.
- Note that median income for tract 0038 (\$47,340) is lower than the provincial median at \$60,580.
- Average age for tract 0038 is 60, compared with 54 for Ontario.

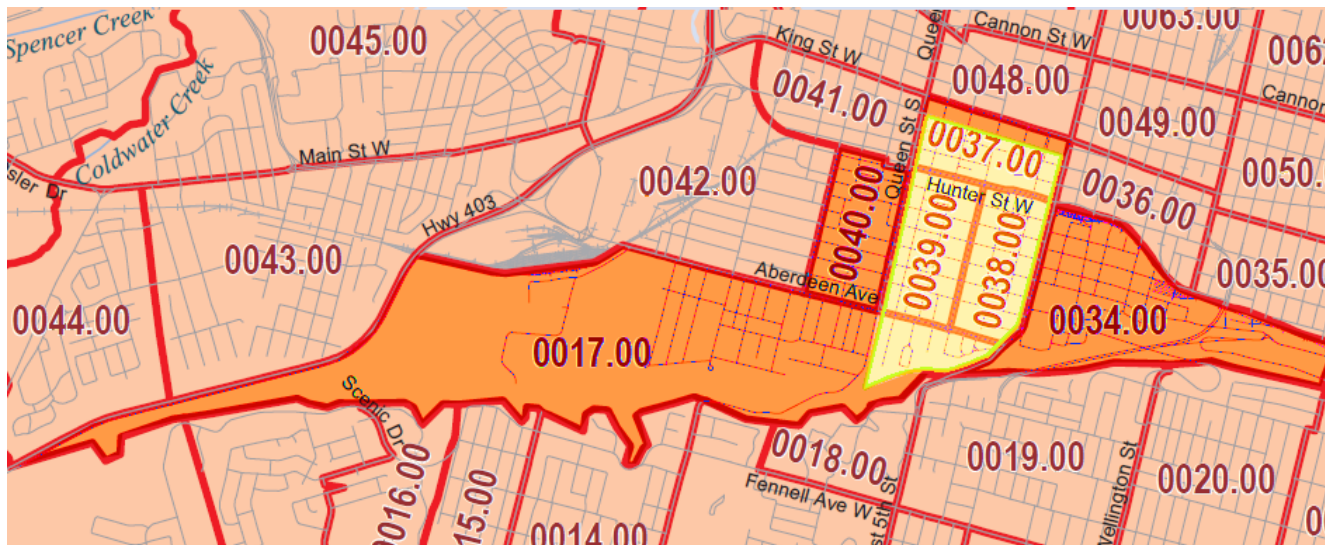


Hamilton, ON

Durand neighbourhood indicated in yellow

Source: Statistics Canada 2014 Charitable Donor Data

- Tract 0017, a portion of which is in the Durand neighbourhood but which extends to include portions of the Escarpment, exhibits a donor rate (36%), average giving (\$2,264), and median giving (\$590) significantly higher than provincial figures.
 - Neighbouring tract 0040 has a high donor rate of 25% but lower average giving of \$1,515 when compared with provincial figures.
 - In contrast, tract 0034 exhibits a comparatively low donor rate (14%), likely impacted by median income (\$46,370) below the provincial median of \$60,580*.
- * Total and average giving data is not available for this tract*



Hamilton, ON - Durand neighbourhood indicated in yellow; nearby tracts of note indicated in orange

Source: Statistics Canada 2014 Charitable Donor Data

- Arts and Culture accounts for a relatively small portion of the overall donor rate and overall dollars raised. This highlights the need for Arts and Culture organizations to have:
 - a compelling case that clearly outlines benefits to the community
 - senior volunteers with profile and credibility that are willing to champion the cause among their networks
 - a pool of prospective donors with a strong affinity to the cause and the capacity to make a major philanthropic gift
- The Greater Hamilton Area is very philanthropic with a strong donor rate and average gift in line with the national and provincial average. However, the area is home to numerous campaigns that are backed by strong cases for support and sophisticated communications and fund development teams. As well, there are many ongoing annual fundraising initiatives that vie for the attention and support of prospective donors.
- While the Durand neighbourhood has a slightly lower donor rate than that of Ontario overall, it has a higher average gift. This means while there are fewer donors, these donors are giving more. However, a potential campaign for St. Mark's would be competing against numerous other causes.



FORWARD THINKING

forwardthinkingKCI.com

TORONTO MONTRÉAL CALGARY VANCOUVER OTTAWA HALIFAX EDMONTON

AUCHMAR ESTATE

REVISED CAPITAL COST ESTIMATE (SUPPLEMENT TO THE OPERATIONAL PLAN)

Updated February 2016

ISSUED: 23 February 2016

PREPARED FOR:

Carolyn Samko
Senior Project Manager
Heritage Facilities and Capital Planning
Tourism & Culture Division
Planning & Economic Development
City of Hamilton
Lister Block Building
28 James Street North, 2nd Floor
Hamilton, Ontario L8R 2K1

PREPARED BY:

ERA Architects Inc.
10 St. Mary Street, Suite 801
Toronto, Ontario M4Y 1P9
416-963-4497

Project No.: 06-008-09
Prepared By: ER/ART

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1.0 Introduction

1.1 Background

The purpose of this brief report is to document all the assumptions made in this relatively high-level, Class D, cost estimate. Correctly this exercise should be termed a budget estimate. A Class D estimate is based on unit cost rates for areas (ie. \$/SF) applied to areas on building plans. This applies even to exterior wall surfaces where more detailed rates developed through experience are converted to area calculations.

The estimate continues to use imperial measure to facilitate comparison over the 10 years of the upgrades of the estimate. In many cases the estimated costs were calculated in metric measure and then converted in the overall budget schedule of work. The conversions are hard but this does not imply a higher level of accuracy (eg. \$400/square metre becomes \$37.17/square foot).

In a Class D estimate a 25% contingency is applied to account for design and site condition changes which are not foreseeable at this preliminary stage.

1.2 Scope and Limitations

The intent of the cost estimate update is to capture all significant project costs incurred on the Estate and to forecast future estimated cost of various combinations of possible projects. It provides an overall estimated capital budget context against which individual projects can be evaluated.

The scope of the estimate covers the following elements on the estate:

- Estate Grounds, including the Convent and Chapel
- Garden Walls and Gates
- Dovecote
- Coach House
- Mansion (Main House) and possible new additions

Elements not included in the scope are:

- Estate Grounds
 - Reconstruction of the later Main Gates on Fennell Avenue
 - Reconstruction of the garden gazebo north of the Mansion

1.3 *Heritage Background (broader conservation picture)*

In accordance with the heritage designation of the Estate and the extraordinary value and significance of the architectural and material, historical and contextual value of its heritage resources, the heritage standard applied to all work undertaken to date on the site and as proposed is that of the Parks Canada “*Standards and Guidelines for the Conservation of Historic Places in Canada*”, and endorsed by the City of Hamilton.

“Conservation”, and the more detailed action of “Preservation” (see definitions below) apply to:

- Garden Walls and Gates
- Dovecote
- Coach House, exterior envelope
- Mansion (Main House), exterior envelope and interior

“Rehabilitation” (see definition below) applies to:

- Estate Grounds
- Coach House, interior
- Mansion (Main House), possible new additions

Parks Canada definitions:

Conservation: All actions or processes that are aimed at safeguarding the character-defining elements of a cultural resource so as to retain its heritage value and extend its physical life. This may involve “Preservation,” “Rehabilitation,” “Restoration,” or a combination of these actions or processes.

Preservation: The action or process of protecting, maintaining, and/or stabilizing the existing materials, form, and integrity of a historic place or of an individual component, while protecting its heritage value.

Rehabilitation: The action or process of making possible a continuing or compatible contemporary use of a historic place or an individual component, while protecting its heritage value.

1.4 *Summary of Overall Estimated Costs for the Estate*

The following summary is based on the estimated cost spreadsheets in Appendices 7.1 and 7.2:

**AUCHMAR ESTATE REVISED CONSERVATION PLAN UPDATE
SUMMARY OF ESTIMATED BUDGET COSTS
February 23, 2016**

	Total estimated project cost	Cost to date	Next phases
1 Estate Grounds, including the Convent and Chapel			\$1,881,145
Estate grounds rehabilitation, paved surfaces and accessibility	\$1,432,145	\$0	
Demolition of the Convent and Chapel	\$189,000	\$0	
New parking area and access road	\$110,000	\$0	
New electrical, sewer, water and gas service connections to Fennell Avenue from Mansion (115 ft approx)	\$150,000		
2 Garden Walls and Gates	\$6,478,838	\$850,000	\$5,628,838
3 Dovecote	\$257,615	\$0	\$257,615
4 Coach House:			
Exterior conservation	\$1,113,348	\$129,720	\$983,628
Exterior conservation with interior rehabilitation	\$1,985,348	\$129,720	\$1,855,628
5 Mansion (Main House) and possible new additions:	\$7,577,358	\$1,219,000	\$6,358,358
Possible new additions - atria, washrooms, kitchen and second floor apartment	\$1,988,000		
Totals in 1st Quarter, 2016 dollars	\$18,180,304	\$2,198,720	\$15,981,583

2.0 Estate Grounds including Convent and Chapel

2.1 *Landscaping*

Following the foundation repairs at the west end of the Mansion, and associated archaeology, minor regrading was undertaken around the Mansion to assist in keeping rainwater away from the foundations.

The estimate covers the possible rehabilitation of 4 components of the historic garden as shown on the site plan in Appendix 7.3:

- Planting beds around the perimeter of the Mansion based on historic photographs also included in Appendix 7.4
- Picturesque garden north of the house as shown in the partial estate plan of 1861 (see Appendix 7.5) indicating informal planting and winding paths and in a series of drawings looking towards the north elevation of the Mansion that consistently confirm the same design
- The allée of evergreens, also called the carriageway, that marks part of the original entrance to the estate from the Gate House 71 Claremont Drive (see Appendix 7.4 for historic photo). This requires an arborist's assessment and selective replanting.
- The kitchen garden enclosed by the high walls to the north of the Coach House, for which good historic photographs exist. An example is included in Appendix 7.4.
- Exterior barrier-free access ramps to the north and south entrances to the Mansion and an elevator in a new addition to the north of the house, serving all three floors, are intended to provide full accessibility on all levels.

2.2 *Hard Paving*

An allowance is included for repaving the existing asphalt circular entrance driveway south of the Mansion and the access road to the Coach House gates. The allowance is for replacement in asphalt which would be the most expensive option. Replacement in consolidated gravel, which may on further research prove to be the older finish, would be cheaper.

2.3 *Convent & Chapel*

The estimate includes for demolishing both buildings, including foundations, and making good the grading for later landscaping. No detailed drawings were available for the estimate.

The assumptions are included as Appendix 7.6.

Approximate drawings were prepared by ERA to determine the extent of the work. The drawings are included in Appendix 7.7

2.4 *New Parking Lot*

The estimate includes for a 25-car parking lot with 2.75 x 5.8m bays and 6m drive aisle, plus a 25m allowance for new connecting driveway, all paved in asphalt. This would also provide fire truck hard standing within 45m of the Mansion.

3.0 Garden Walls and Gates

The entrance gates to the Coach House and part of the wall enclosing the Kitchen Garden were reconstructed on new foundations to exactly match the original during 2015.

The final contract amount of \$850,000 for the project has been used in estimating the possible reconstruction of the remainder of the garden walls, which are of a similar height and random rubble stone construction, and highly unusual in their height and length.

4.0 Dovecote

Auchmar's dovecote is a highly unusual, rare and special building, and one of very few in Canada (see Appendix 7.4 for historic photo). It is weathering relatively slowly, but the highly ornate woodwork at roof level, best seen in archival photographs, is very vulnerable to loss. The estimate allows for the exterior conservation of the Dovecote including some structural stabilization work. The work is of medium priority presently and will allow the dovecote to be used again, possibly as a shed for garden maintenance.

No work has been undertaken on the Dovecote to date.

5.0 Coach House

Information for the estimate is derived from the design proposal by ERA Architects in 2006 for use of the Coach House as a Curatorial Centre, with a conservation workshop and archival storage facility, for the City of Hamilton. The schematic design was sufficiently developed to show detailed compliance with the OBC life safety requirements prevailing then. The estimate also made use of the Class D Budget Estimate (see Appendix 7.8) prepared by T. J. M Brown and Associates for the renovation of March 18, 2011, based on the 2006 drawings.

The current estimate used the 2006 design, with high-level modifications to suit the revised proposed use as flexible office suite for City Staff.

The basic circulation and exiting arrangements are not altered. The open well between floors is maintained. Archival storage and archaeological workshop become open office areas and specialized spaces become small individual offices. According to a typical space standard of 4.5 m² for open office cubicles, the building could accommodate approximately 20 staff, plus reception area, meeting room and adjacent lunchroom (see Appendix 7.9 for annotated plans).

The proposed changes respect the heritage value of this designated building. On the exterior, changes included in the estimate for glazing 2 existing large openings and 2 existing door openings on the ground floor and respecting the heritage value by adding exterior doors to all ground floor openings, except the entrance, to reflect the original coach house function.

The roof covering of asphalt shingles is scheduled to be replaced this summer which will provide renewed protection to the heritage fabric of this designated building.

The roof work will be undertaken in the spring of 2016. Capital funds for this are shown in the “completed to date” column of Appendix 7.1.

6.0 Mansion

The interior of the Mansion is unchanged since the minor alterations done by the convent in the 1960s. The interior changes made by Helen Buchanan in 1901 remained mostly intact and so the house reflects the whole history of its alterations and the estimate is based on conserving this as far as possible.

The ground floor plan provided for use in the estimate, Pre-concept Plan Option #3, is attached as Appendix 7.10. The specific use of the house remains undetermined, but it is hospitality related and so the proposed alterations at the east end of the house, and around the east wing, are intended to provide additional reception areas, washrooms and an upgraded kitchen.

In the absence of a code analysis of the life safety provisions within the house, some preliminary assumptions were made for the estimate based on an Assembly Occupancy under the OBC. This included fully protecting the building with a sprinkler system, and providing an advanced 2-stage fire alarm system.

Structurally Assembly Occupancy, even with a permitted limit on the number of occupants, would likely still require structurally upgrade of the floors to carry increased loading. Since this work is very disruptive of the heritage fabric, it is included for the ground floor rooms only because the basement ceilings, where most of the access would be needed are in poor condition. The assumption also is that as the structure of the house is very robust, it likely would meet a high standard for residential loading on the second floor and this area would be limited to meeting rooms and offices and accessible to the general public only in small groups on controlled tours.

7.0 Appendices

- 7.1 Overall Conservation and New Work Spreadsheet
- 7.2 Turner and Townsend New Work Spreadsheet, Class D Estimate, Revision 1
- 7.3 Proposed Plan for Rehabilitation of Historic Gardens
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- 7.6 Assumptions about Convent Construction
- 7.7 Approximate Plans of Convent and Chapel
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- 7.10 Mansion Pre-Concept Plan Option #3

Appendix 7.1 – Overall Conservation and New Work Spreadsheet

AUCHMAR ESTATE - Revised Capital Cost Estimate Update

COST ESTIMATE UPDATE (CLASS D), FIRST QUARTER 2016
February 23, 2016

Note: Cost Estimates supplied by ERA Architects in 2006; updated for inflation in 2009 for Heritage Capital Projects City of Hamilton; updated for inflation by ERA in 2016

			Quantity	Unit	Rate	Estimated Total Project	SECTION TOTALS	Completed to date	Next phases	Comments
4.1	ESTATE GROUNDS									
	a) Site development	New retaining wall on east side of West 5th Street by the City of Hamilton				Complete				
	b) Landscaping	Restoration of planting and picturesque landscape elements, allee of evergreens and kitchen garden				603,000			\$603,000	
	c) Grading and Hard Surfaces	Minor regrading away from the walls at west end of Mansion				complete				
		Remove asphalt and restore paved surfaces to south side of Mansion as far as gate in appropriate materials (compacted & consolidated granular)	15,000	sf	15	225,000			\$225,000	
		Landscaping & patio entrances [hard surfaces] to Coach House (allowance)	Brown			53,500			\$53,500	
	d) Accessibility upgrades	Barrier-free ramp in concrete with stone veneer on flanking walls and stoen copings, with painted metal railings to main entrance (separate from building face)	35	lf	1,500	52,500			\$52,500	
		Barrier-free ramp and landings in concrete with stone veneer on flanking walls and stone copings, with painted metal railings, to north entrance (in location of former paved terrace with balustrade) (separate from building face)	45	lf	1,500	67,500			\$67,500	
		Section Total					\$1,001,500	\$0		
		General Requirements and fees	18.00%				\$180,270		\$180,270	
		Design and site conditions contingency	25.00%				\$250,375		\$250,375	
							\$1,432,145			
		Demolish 1960s convent and chapel, and dispose of off site					\$189,000		\$189,000	
		New 25-car parking area and driveway					\$110,000		\$110,000	
		New electrical, sewer, water and gas service connections to Fennell Avenue from Mansion (115 ft approx)					\$150,000		\$150,000	
		Total estimated Estate Gounds costs					\$1,881,145	\$0	\$1,881,145	
4.2	GARDEN WALLS & GATES									
		Stabilized portions of Kitchen Garden wall (105 lf), 14 ft high, including foundations	105	lf	4,000	293,707		\$420,000		
		Stabilize remainder of Kitchen Garden wall (300 lf - 105 lf), including foundations	195	lf	4,000	780,000			\$780,000	
		Stabilize garden wall (950 lf), 10 high)	950	lf	3,200	3,040,000			\$3,040,000	
		Remove vine and tree roots which are in contact with the wall. Ensure that no new trees are planted or allowed to seed next to wall.			Allowance	10,000			\$10,000	
		Install flashing to coping cap to prevent water ingress to masonry (standing sections)	1,250	lf	85	106,250			\$106,250	
		Restore Coach House Gate (updated information from Hamilton)				300,699		\$430,000		
							\$4,530,656		\$3,936,250	
		General Requirements and fees	18.00%				\$815,518	included	\$708,525	
		Design and site conditions contingency	25.00%				\$1,132,664	included	\$984,063	
		Total estimated Garden Walls and Gates conservation costs					\$6,478,838	\$850,000	\$5,628,838	\$5,628,838

AUCHMAR ESTATE - Revised Capital Cost Estimate Update

Note: Cost Estimates supplied by ERA Architects in 2006; updated for inflation in 2009 for Heritage Capital Projects City of Hamilton; updated for inflation by ERA in 2016

			Quantity	Unit	Rate	Estimated Total Project	SECTION TOTALS	Completed to date	Next phases	Comments
4.3	DOVECOTE									
		Restore as part of garden wall programme:								
		Masonry (updated 2009 to 2016 for inflation, 12%)				97,500			\$97,500	
		Roofing including roof structure (ditto)				40,500			\$40,500	
		Ventilator (ditto)				24,650			\$24,650	
		Woodwork including painting woodwork and trim (ditto)				9,500			\$9,500	
		Replace 2nd floor platform and provide new access ladder.				8,000			\$8,000	
		Subtotal					\$180,150			
		General Requirements and fees	18.00%				\$32,427		\$32,427	
		Design and site conditions contingency	25.00%				\$45,038		\$45,038	
		Total estimated Dovecost conservation costs					\$257,615	\$0	\$257,615	
4.4	COACH HOUSE									
4.4.1	SUBSTRUCTURE									
		Allowance for foundation masonry				25,000				
							\$25,000	\$0	\$25,000	
4.4.2	STRUCTURE									
	a)	Roof								
		Allowance for repairs to eaves and structure				25,000			\$25,000	
		Repair wood framed dormers and sheathing		Brown	Allowance	10,000			\$10,000	
	b)	Floors above grade								
		New 1 1/2" thick concrete topping to existing slab-on-grade		Brown		7,500			\$7,500	
	c)	Floors below grade								
		N/A					\$42,500	\$0	\$42,500	
4.4.3	BUILDING ENVELOPE									
	a)	Walls above grade								
		Minor stonework repairs and 25% selective repointing				100,500			\$100,500	
		Exterior trim replacement & restoration		Brown	25,000	27,000			\$27,000	
		Exterior painting (Doors and frames, windows, wood trim)		Brown	20,000	21,500			\$21,500	
	b)	Walls at or below grade								
		N/A								
	c)	Windows								
		Windows, skylights, glass, glazing & caulking		Brown	18,000	19,500			\$19,500	
		Repair of existing wood windows		18 no.	2,500	45,000			\$45,000	
		New narrow light double-glazed windows		7 no.	4,500	31,500			\$31,500	
		New double light double-glazed windows		4 no.	8,000	32,000			\$32,000	
	d)	Exterior Doors								
		New frame exterior hardwood doors & frames, with hardware		16 no.	4,000	64,000			\$64,000	
		New glazed framed hardwood entrance door and frame, with hardware		1 no.	5,500	5,500			\$5,500	
	e)	Roof Covering								
		Remove existing and replace wood roof shingles, including restored roof dormers, with 1/2 round galvanized gutters, round downspouts & flashings		Brown	73,000	65,248		\$92,000		To be carried out in the Spring of 2016
		Cladding to elevator shaft above roof level		Brown	6,800	8,200			\$8,200	
	f)	Rainwater Disposal								
		See roof								
	g)	Chimneys / Projections								
		Replicate missing wood finials at eaves and ridges		7 no.	8,000	56,000			\$56,000	
		Replicate missing wood finials to roof dormers		4 no.	3,000	12,000			\$12,000	
		Restoration of gable fretwork		4 no.	10,000	40,000			\$40,000	
		Repair and resecure existing finials		3 no.	3,000	9,000			\$9,000	
		Restoration of dormer wood details		4 no.	3,500	14,000			\$14,000	
							\$550,948	\$92,000	\$485,700	

AUCHMAR ESTATE - Revised Capital Cost Estimate Update

Note: Cost Estimates supplied by ERA Architects in 2006; updated for inflation in 2009 for Heritage Capital Projects City of Hamilton; updated for inflation by ERA in 2016

			Quantity	Unit	Rate	Estimated Total Project	SECTION TOTALS	Completed to date	Next phases	Comments
4.4.4	INTERIORS									
	a) Partitions	Carpentry work (wood studs & beams) etc.		Brown		15,000			\$15,000	
		Drywall, insulation & taping to partitions, bulkheads & ceilings		Brown		42,000			\$42,000	
		6 mil tempered glass partitions, c/w with hollow metal framing		Brown		31,000			\$31,000	
		8" blockwork & foundation footings to elevator shaft		Brown		15,500			\$15,500	
	b) Interior Doors	New interior hardwood veneer doors & frames		Brown		30,000			\$30,000	
		Finish hardware (allowance)		Brown		22,000			\$22,000	
							\$155,500	\$0	\$155,500	
	c) Ceiling & Wall Finishes	Painting & decorating		Brown		21,000			\$21,000	
	d) Floor Finishes	Finish flooring & baseboards		Brown		30,000			\$30,000	
							\$51,000	\$0	\$51,000	
	d) Fittings and Fixtures	Kitchen counters & cabinets		Brown		25,000			\$25,000	
		Engineered glazed sectional railings (allowance)		Brown		12,500			\$12,500	
	f) Equipment									
	g) Conveying Systems	New elevator for accessibility		Brown		135,000			\$135,000	
							\$172,500	\$0	\$172,500	
4.4.5	SERVICES									
	a) Mechanical	Plumbing & drainage		Brown		31,000			\$31,000	
		Waterline for sprinkler system (allowance)		Brown		30,500			\$30,500	
		HVAC system		Brown		166,500			\$166,500	
		Provide sprinkler system - 40 heads and supporting mechanical.	40	no.	500	20,000			\$20,000	
							\$248,000	\$0	\$248,000	
	b) Electrical	Lights & lighting		Brown		25,000			\$25,000	
		Power switches, outlets, controls & sensors, communications infrastructure		Brown		128,000			\$128,000	
		Rough-ins for security system & alarms etc.		Brown		9,600			\$9,600	
							\$162,600	\$0	\$162,600	
		Subtotal for Coach House					\$1,408,048	\$92,000	\$1,316,048	
		General Requirements and fees	16.00%				\$225,288	\$14,720	\$210,568	1.41
		Design and site conditions contingency	25.00%				\$352,012	\$23,000	\$329,012	1.41
		Total estimated Coach House conservation and upgrade costs					\$1,985,348	\$129,720	\$1,855,628	1,855,628.00
4.5	MANSION									
4.5.1	SUBSTRUCTURE									
	a) Foundations	Repairs at west end				complete				
		Allowance for additional foundation repairs				50,000				
							\$50,000	\$0	\$50,000	

AUCHMAR ESTATE - Revised Capital Cost Estimate Update

Note: Cost Estimates supplied by ERA Architects in 2006; updated for inflation in 2009 for Heritage Capital Projects City of Hamilton; updated for inflation by ERA in 2016

			Quantity	Unit	Rate	Estimated Total Project	SECTION TOTALS	Completed to date	Next phases	Comments
4.5.2	STRUCTURE									
	a)	Roof				50,000			\$50,000	
	b)	Floors above grade				10,000			\$10,000	
			4,900	sf	45	220,500			\$220,500	This work can be mostly carried from the basement. On the second floor strengthening would severely impact heritage plaster, including in the principal rooms
	c)	Floors below grade								
							\$280,500	\$0	\$280,500	
4.5.3	BUILDING ENVELOPE									
	d)	Walls above grade				117,857		\$165,000		
						39,500			\$39,500	
	e)	Walls below grade								
	f)	Windows				362,857		\$508,000		
			43	pr.	6,000	258,000			\$258,000	
			14	no.	6,500	91,000			\$91,000	
	g)	Exterior Doors				complete				
			5	no.	1,500	7,500			\$7,500	
						13,970			\$13,970	
			4	no.	3,000	12,000			\$12,000	
	a)	Roof Covering				78,571		\$110,000		
			2,100	sf	18	37,800			\$37,800	
			160	lf	60	9,600			\$9,600	
	c)	Rainwater Disposal				17,857		\$25,000		
			3	no.	4,000	12,000			\$12,000	
						complete				
	b)	Chimneys and Projections				240,000		\$336,000		
			2	no.	60,000	120,000			\$120,000	
			2	no.	25,000	50,000			\$50,000	
	h)	Exterior Stairs				Complete				
							\$1,468,513	\$1,144,000	\$651,370	\$324,513
4.5.4	INTERIOR									
	a)	Partitions								
	b)	Doors	40	no.	3,000	120,000			\$120,000	
			12	no.	800	9,600			\$9,600	
			40	no.	750	30,000			\$30,000	

AUCHMAR ESTATE - Revised Capital Cost Estimate Update

Note: Cost Estimates supplied by ERA Architects in 2006; updated for inflation in 2009 for Heritage Capital Projects City of Hamilton; updated for inflation by ERA in 2016

		Quantity	Unit	Rate	Estimated Total Project	SECTION TOTALS	Completed to date	Next phases	Comments
		12	no.	500	6,000			\$6,000	
c)	Staircases								
	Repair and touch up clear finish on 2 principal stairs in Mansion	2	no.	5,000	10,000			\$10,000	
	Repair and repaint 2 stairs in East Wing	2	no.	1,500	3,000			\$3,000	
d)	Interior Ceiling & Wall Finishes								
	Restore interior plaster finishes - crack repair / decorative elements / water damaged areas, in basement, prepare and repaint	4,900	sf	15	73,500			\$73,500	
	Restore interior plaster finishes - crack repair / decorative elements / water damaged areas, in ground and second floors, prepare and repaint	13,277	sf	22	292,094			\$292,094	
e)	Floor Finishes								
	Remove carpets, make good wood flooring, sand and refinish on ground and second floors	10,650	sf	8	85,200			\$85,200	
	Replace 20% of wood flooring on ground and second floors to match existing, sand and clear finish	2,650	sf	15	39,750			\$39,750	
	Tile repairs in washrooms.	4	no.	3,000	12,000			\$12,000	
c)	Decorative Woodwork								
	Restore clear finishes on wood column shafts, deep baseboards and paneling			Allowance	100,000			\$100,000	
	Restore missing cabinetry in Library.			Allowance	35,200			\$35,200	
						\$816,344	\$0	\$816,344	
4.5.5 SERVICES									
a)	Mechanical								
	Replace existing steam boiler, burner and controls.				35,714			\$50,000	
	Add water softener and chemical treatment for steam boiler.				17,857			\$25,000	
	Replace rusting condensate piping in basement.				42,900			\$42,900	
	New heating distribution and controls, piping and air conditioning to maintain and preserve interior finishes, ground and second floors	13,277	sf	35	464,695			\$464,695	
	New heating distribution and controls, piping and air conditioning to maintain and preserve interior finishes, basement	4,900	sf	28	137,200			\$137,200	
	Upgrade plumbing.				55,000			\$55,000	
	Provide sprinkler system - 150 heads and supporting mechanical.	150	no.	350	52,500			\$52,500	
	4" sprinkler main and controls.				75,000			\$75,000	
b)	Electrical								
	Conduct tests on all terminals for hot spots on an annual basis.				complete				
	Replace electrical wiring, outlets, switches, fixtures and controls.	18,175	sf	25	454,375			\$454,375	
	Provide smoke detectors and carbon monoxide detectors				17,600			\$17,600	
	Provide fire alarm system complete with pull stations, exit lights and alarms				24,200			\$24,200	
						\$1,377,041	\$75,000	\$1,323,470	
	Subtotal of Mansion					\$3,992,398	\$1,219,000	\$3,121,684	
	General Requirements and fees	15.00%				\$598,860	included	\$468,253	
	Design and site conditions contingency	25.00%				\$998,100	included	\$780,421	
	Subtotal estimated conservation costs					\$5,589,358		\$4,370,358	\$0
	New Atrium addition to Mansion including washrooms and elevator to 3 floors					\$1,988,000		\$1,988,000	
	Total estimated Mansion conservation and upgrade costs					\$7,577,358	\$1,219,000	\$6,358,358	\$6,358,358
	TOTAL ESTIMATED COSTS FOR ALL WORKS					18,180,303	\$18,180,303	\$2,198,720	\$15,981,583

Appendix 7.2 – Turner and Townsend New Work Spreadsheet, Class D Estimate, Revision

**AUCHMAR
CLASS D CONSTRUCTION COST ANALYSIS**

<u>Executive Summary</u>	GFA (sf)	\$/sf	Amount
1 Atrium Addition	1,808	\$1,099	\$1,988,000
2 Demolish existing 2 storey building	15,726	\$12	\$189,000
3 25 no surface parking space			\$87,500
4 25m long x 6m wide driveway			\$22,500
5 Service Connections (water, sewage, electrical, gas) - approx 35m			\$150,000
Sub-Total	1,808	\$1,348	\$2,437,000
6 Estimating Contingency			INCLUDED
Sub-Total	1,808	\$1,348	\$2,437,000
7 Escalation Allowance			EXCLUDED
Sub-Total	1,808	\$1,348	\$2,437,000
8 Post Tender Construction Contingency			EXCLUDED
PROJECTED TOTAL CONSTRUCTION COST (EXCL HST)	1,808	\$1,348	\$2,437,000

1 The above is an Opinion of Probable Cost only

2 Project Soft Costs - EXCLUDED

3 The analysis is priced in current 1Q 2016 dollars; Construction Price Escalation has been excluded

4 No Geotechnical Report is currently available; conventional foundation is assumed

5 The Following have been EXCLUDED

- HST
- All Project Soft Costs
- Permits and Development Charges
- FFE (Furniture, Furnishings and Equipment) - other than detailed
- Professional and Specialist Consultant Fees
- Scoreboard
- A/IT/Security Equipment (conduit and rough in only allowed in base estimate)
- Hazardous material abatement, if any
- Acceleration Premiums
- Premiums Associated with Single-Sourcing if any
- Construction Price Escalation beyond 1Q 2016



**ELEMENTAL COST SUMMARY
CLASS D CONSTRUCTION COST ESTIMATE**

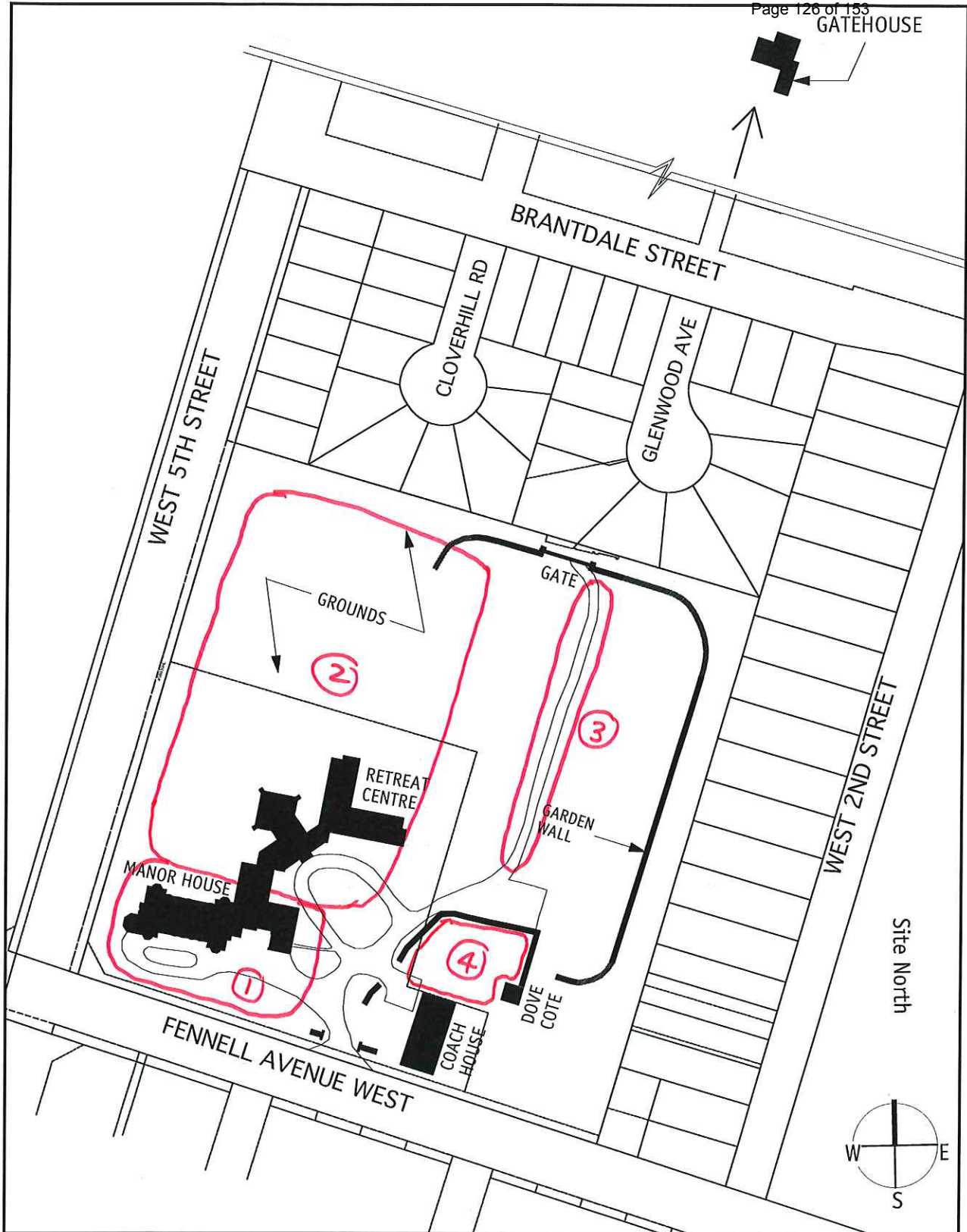
ATRIUM ADDITION

Project: Auchmar
Location: Hamilton, ON
Owner/Client: City of Hamilton
Architect: ERA

Cat: 730
File: RN-CD-RO
Date: Feb 19 2016
Project Number:
Gross Floor Area: 168 m2

Element	Ratio to GFA	Elemental Quantity	Elemental Unit Rate	Elemental Amount	Cost/m2	Amount	
A SHELL							
A1 SUBSTRUCTURE							
A11 Foundation - Conventional	1.00	168 m2	\$571.43	\$96,000	\$571.43		
A12 Basement Excavation	0.30	50 m3	\$100.00	\$5,000	\$29.76	\$101,000	5%
A2 STRUCTURE							
A21 Lowest Floor Construction	1.00	168 m2	\$101.19	\$17,000	\$101.19		
A22 Upper Floor Construction	0.00	0 m2	\$0.00	\$0	\$0.00		
A23 Roof Construction	1.00	168 m2	\$398.81	\$67,000	\$398.81	\$84,000	4%
A3 EXTERIOR ENCLOSURE							
A31 Walls Below Grade	0.24	40 m2	\$450.00	\$18,000	\$107.14		
A32 Walls Above Grade	1.34	225 m2	\$200.00	\$45,000	\$267.86		
A33 Windows & Entrances	1.34	225 m2	\$1,675.56	\$377,000	\$2,244.05		
A34 Roof Covering	1.00	168 m2	\$1,500.00	\$252,000	\$1,500.00		
A35 Projections	1.00	168 m2	\$148.81	\$25,000	\$148.81	\$717,000	36%
B INTERIORS							
B1 PARTITIONS & DOORS							
B11 Partitions	0.60	100 m2	\$200.00	\$20,000	\$119.05		
B12 Doors	0.06	10 No	\$2,000.00	\$20,000	\$119.05	\$40,000	2%
B2 FINISHES							
B21 Floor Finishes	0.95	160 m2	\$200.00	\$32,000	\$190.48		
B22 Ceiling Finishes	0.95	160 m2	\$200.00	\$32,000	\$190.48		
B23 Wall Finishes	1.79	300 m2	\$50.00	\$15,000	\$89.29	\$79,000	4%
B3 FITTINGS & EQUIPMENT							
B31 Fittings & Fixtures	1.00	168 m2	\$327.38	\$55,000	\$327.38		
B32 Equipment	0.00	0 m2	\$0.00	\$0	\$0.00		
B33 Conveying Systems	0.02	3 stp	\$60,000.00	\$180,000	\$1,071.43	\$235,000	12%
C SERVICES							
C1 MECHANICAL							
C11 Plumbing & Drainage - included	0.00	0 m2	\$0.00	\$0	\$0.00		
C12 Fire Protection - included	0.00	0 m2	\$0.00	\$0	\$0.00		
C13 H.V.A.C.	1.00	168 m2	\$601.19	\$101,000	\$601.19		
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C22 Lighting, Devices & Heating	1.00	168 m2	\$398.81	\$67,000	\$398.81		
C23 Systems & Ancillaries - included	0.00	0 m2	\$0.00	\$0	\$0.00	\$67,000	3%
NET BUILDING COST (Excluding Site)					\$8,476.19	\$1,424,000	72%
D SITE & ANCILLARY WORK							
D1 SITE WORK							
D11 Site Development	1.00	168 m2	\$297.62	\$50,000	\$297.62		
D12 Mechanical Site Services	1.00	168 m2	\$89.29	\$15,000	\$89.29		
D13 Electrical Site Services	1.00	168 m2	\$89.29	\$15,000	\$89.29	\$80,000	4%
D2 ANCILLARY WORK							
D21 Demolition	0.00	0 m2	\$0.00	\$0	\$0.00		
D22 Alterations	0.00	0 m2	\$0.00	\$0	\$0.00	\$0	0%
NET BUILDING COST (Including Site)					\$8,952.38	\$1,504,000	
Z GENERAL REQUIREMENTS & ALLOWANCES							
Z1 GEN. REQ. & FEE 15.0%							
Z11 General Requirements	10.0%			\$150,000	\$892.86		
Z12 Fee	5.0%			\$75,000	\$446.43	\$225,000	11%
TOTAL CONSTRUCTION ESTIMATE (Excluding Allowances)						\$1,729,000	87%
Z2 ALLOWANCES 15.0%							
Z21 Estimating Contingency	15.0%			\$259,000	\$1,541.67		
Z22 Escalation Allowance	0.0%	EXCLUDED		\$0	\$0.00		
Z23 Construction Allowance	0.0%	EXCLUDED		\$0	\$0.00	\$259,000	13%
GOOD & SERVICES TAX 0.0% EXCLUDED							
TOTAL CONSTRUCTION ESTIMATE (Including Allowances)						\$1,988,000	100%
GFA	168 m2				Cost/m2	\$11,833	
GFA	1,808 sf					\$1,099	

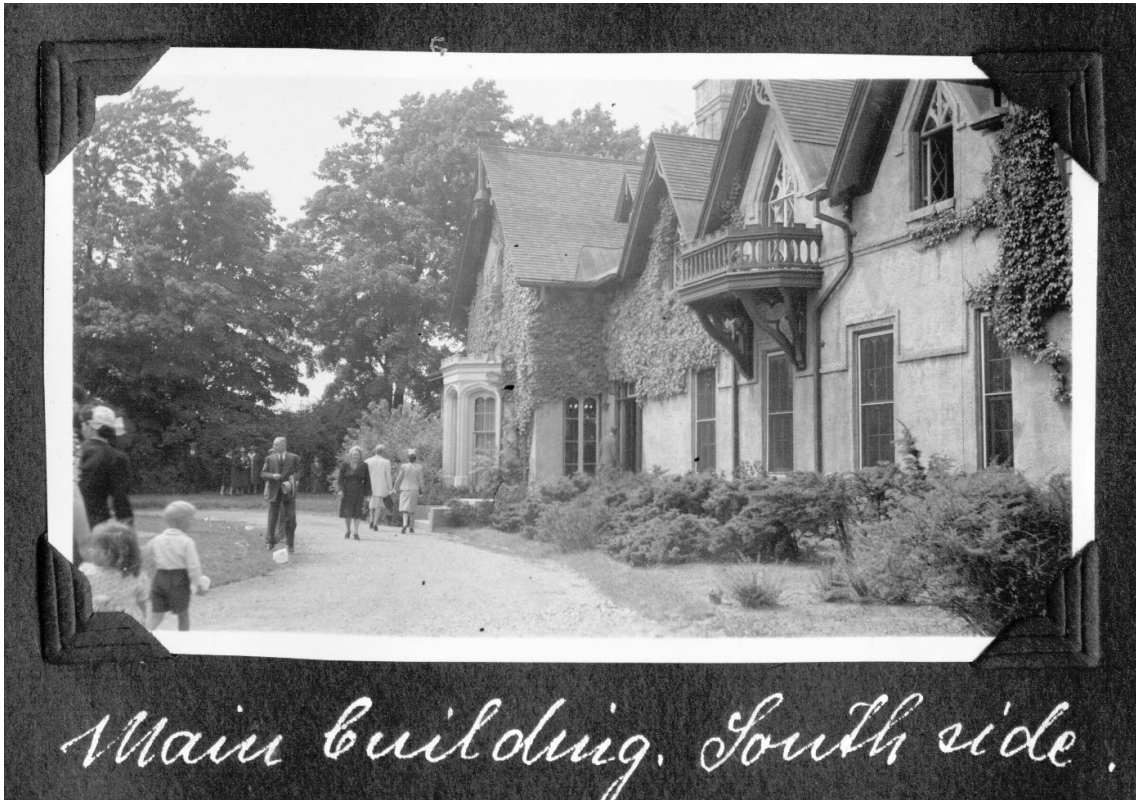
Appendix 7.3 – Proposed Plan for Rehabilitation of Historic Gardens



AUCHMAR, CITY OF HAMILTON - KEY PLAN

- ① RESTORED PLANTING BEDS AND ACCESSIBILITY RAMPS AROUND MANSION
- ② RESTORED PICTURESQUE GARDEN.
- ③ RESTORED ALLEE (CARRIAGEWAY) OF EVERGREENS
- ④ RESTORED KITCHEN GARDEN.

Appendix 7.4 – Auchmar Archival Photos



Perimeter planting beds, Mansion.



Allee or Carriageway.



Kitchen Garden from the Southwest, c. 1932.



Dovecote from the West, circa 1932.

Appendix 7.5 – Partial Plan Estate 1861



Appendix 7.6 – Assumptions about Convent Construction

Building dates from 1960s.

Substructure

- Foundations: concrete block on concrete strip footings

Structure

- Lowest floor construction: ground floor, concrete slab on grade
- Upper floor construction: second floor, reinforced concrete slabs bearing on exterior walls and interior structural partitions
- Roof: light wood trusses on dormitory wings and refectory; engineered wood trusses on chapel

Exterior enclosure

- Walls below grade: not applicable
- Walls above grade: Concrete loadbearing blockwork, brick veneer, no evidence of weepers etc. for a cavity
- Windows: aluminum, single glazed, single hung, sash windows
- Exterior doors: wood paneled
- Roofing coverings: asphalt shingles on chapel and dormitories

Interiors:

- Partitions: painted concrete block, some load-bearing as indicated on rough plan on refectory and dormitory wings;
- Interior doors: wood slab with wood frames

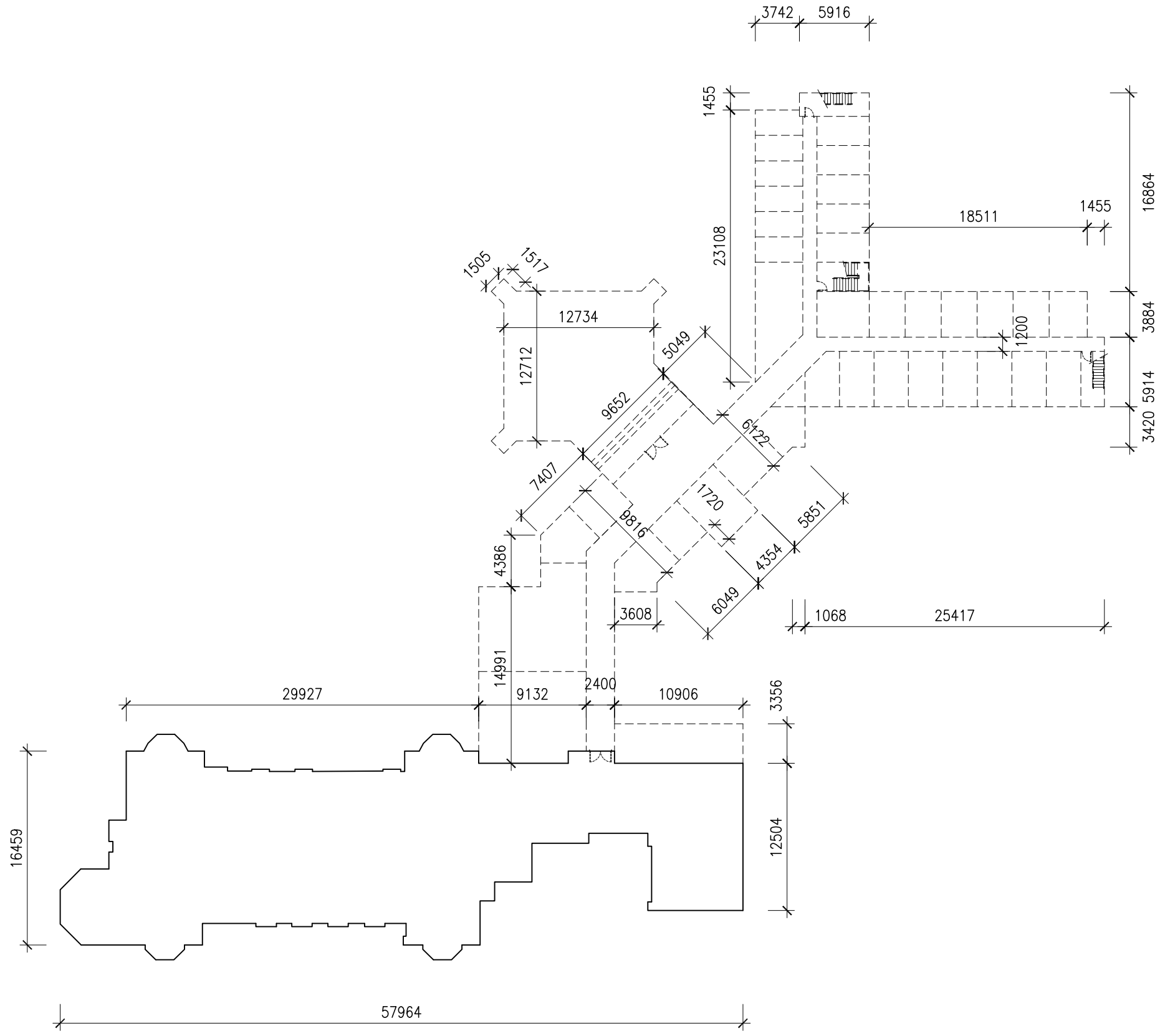
Finishes:

- Floor finishes: carpet on concrete slab
- Ceiling finishes: painted drywall with batt insulation in attic
- Wall finishes: on exterior walls, painted drywall on wood furring with batt insulation

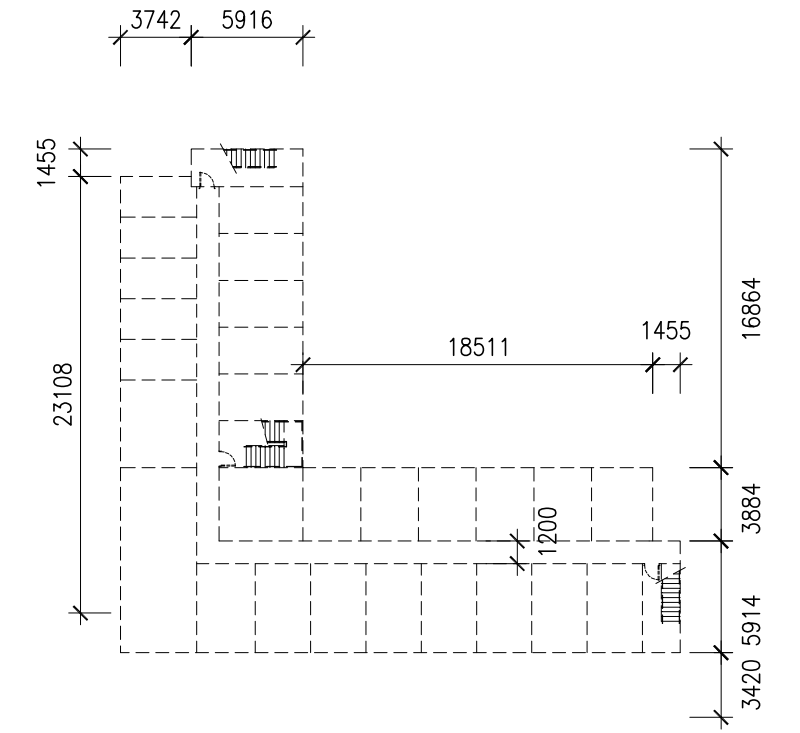
Services:

- Plumbing and drainage:
- Fire protection: no sprinkler system
- HVAC: Heating, hot water with perimeter baseboard radiators; assume all piping in cold spaces lagged with asbestos
no cooling; no fresh air system

Appendix 7.7 – Approximate Plans of Convent and Chapel



GROUND FLOOR
SCALE 1:400



SECOND FLOOR
SCALE 1:400

**Appendix 7.8 – T. J. M Brown and Associates Class D Estimate for Coach House
Renovation**

T.J.M. BROWN & ASSOCIATES

Suite #16- 2550 Goldenridge Rd., Mississauga, Ont., L4X-2S3. Tel #: (905)-275-8971.

Mar 18th, 2011

CLASS 'D' BUDGET ESTIMATE FOR RENOVATIONS TO AUCHMAR ESTATE, #88 FENNEL WEST, HAMILTON, ONTARIO

- Project Administration & Job Site Overheads: ===== \$58,800.00
- Inspections & Testing (*allowance*): \$10,000.00
- Sweeping, Brushing, & Cleaning Existing Slab-on-Grade: ===== \$3,000.00
- Minor Stonework Repairs etc.: ~~\$12,000.00~~ \$ 43,000.
- Opening up Existing Fireplace: ===== \$2,000.00
- Removing & Replacing Wood Asphalt Roof Shingles,
1/2 round galv. Gutters, Downpipes, & Flashings: ~~\$15,000.00~~ \$ 73,000.
round downspouts
- New 1½ Pea-Gravel Concrete Topping to Existing Slab-on-Grade: ===== \$5,800.00
- 8" Blockwork & Foundation Footings to Elevator Shaft: \$12,580.00
- Carpentry Work (wood studs & beams) etc.: ===== \$8,884.00
note: exterior trim replacement & restoration \$25,000.
- Cladding to Elevator Shaft above Roof Level: \$6,800.00
- New Handicapped Elevator: ===== \$112,000.00
- New Solid Core Exterior Hardwood Doors & Frames: \$8,080.00
- New Interior Hardwood Veneer Doors & Frames: ===== \$28,000.00
- Finish Hardware (*allowance*): \$20,000.00
- Drywall, Insulation, & Taping to Partitions, Bulkheads, & Ceilings: ===== \$38,800.00

-6 Mil Tempered Glass Partitions, c/w Hollow Metal Framing: \$28,780.00

-Engineer Designed Glazed Sectional Railing System (allowance): ===== \$10,000.00

-Windows, Skylights, Glass, Glazing, & Caulking: \$18,800.00

note: exterior windows & doors \$116,000.

-Painting & Decorating: ===== \$12,800.00

note: exterior paint \$20,000.

-Perforated Blinds (allowance): \$10,000.00

-Finish Flooring & Baseboards: ===== \$18,000.00

-Kitchen Counters & Cabinets: \$20,000.00

Electrical Work:

-Lights & Lighting: ===== \$23,000.00

-Power, Switches, Outlets, Controls, & Sensors: \$118,800.00

-Rough-ins for Security System & Alarms etc.: ===== \$8,000.00

Sprinkler Systems: \$12,800.00

-Waterline for Sprinkler System (allowance): ===== \$25,000.00

-Plumbing & Drainage: \$28,800.00

Fume Hood & Ductwork: ===== -By Others-

-Appliances (allowance): \$10,000.00

-HVAC System: ===== \$138,000.00

-Final Clean-up: \$7,880.00

-Landscaping & Patio Entrances [hard surfaces]- (allowance): == \$50,000.00

-Constructor's Profit: \$100,000.00

Sub-Total: ===== \$1,011,104.00

Design Contingency: \$101,118.00

Construction Contingency: \$101,118.00

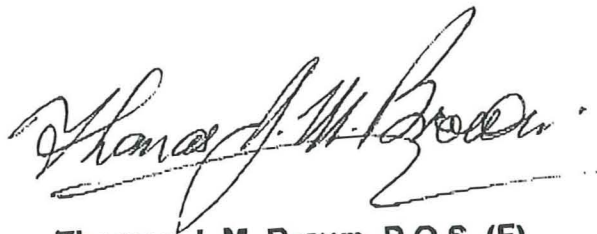
Grand Total: \$1,213,420.00

Plus H.S.T.

N.B.:

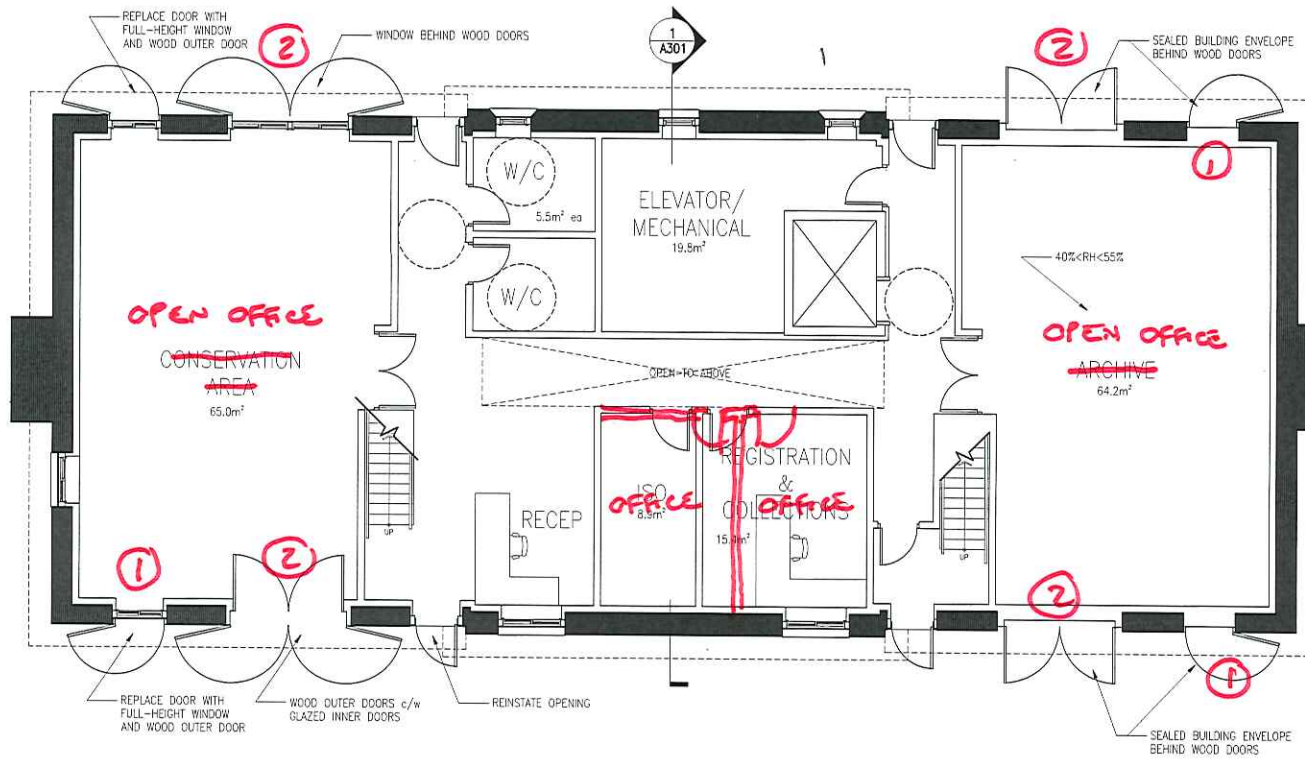
- 1)-The above Budget Estimate is for hard costs ONLY, and is exclusive of all legal & design fees, furniture, removal of hedges etc., underpinning, interior landscaping, & signage.**
- 2)-Costs are based on present day market conditions.**
- 3)-Escalation has NOT been taken into account.**

Yours Truly,

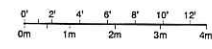


Thomas J. M. Brown, P.Q.S. (F)

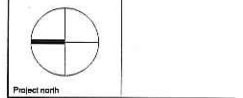
Appendix 7.9 – Annotated ERA Architect Coach House Plans



FEB 23, 2016



10/01/10	RFP (Revised)
09/08/10	RFP
04/08/10	HERITAGE REVIEW
28/07/10	SPACE PLANNING REVIEW
DATE	ISSUED FOR



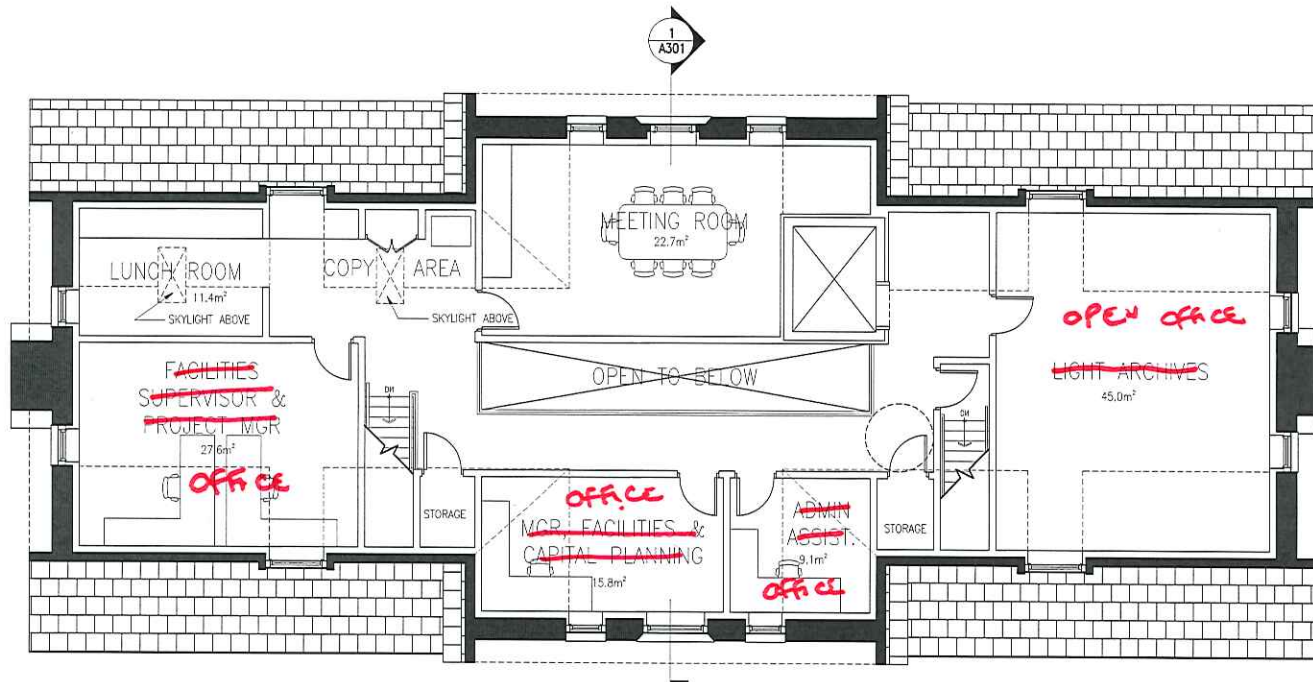
E.B.A.
E.B.A. Architects Inc., 10 St. Mary St., Suite 201, Toronto, Canada, M5T 1S6
T: (416) 593-4487 F: (416) 593-0721 info@eba.ca www.eba.ca

Project	
AUCHMAR COACH HOUSE	
Address	88 Fennell Avenue, HAMILTON, ON
For	CITY OF HAMILTON
Project no.	06-008-4
Scale	1 : 100
Drawn by	JG, SD
Reviewed by	JK, ER
Drawing title	

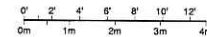
Ground Floor Plan

Sheet no.
A101

This drawing is the property of E.B.A. Architects Inc. and may not be used or reproduced without expressed approval. E.B.A. is Engineering drawings before proceeding with work. The Contractor shall verify all dimensions and work on site and report any discrepancies to E.B.A. before beginning work. Do not scale from the drawing. Use Square dimensions only. The Contractor is responsible for any changes made to the drawing without E.B.A.'s approval.



FEB 23, 2016



10/01/10	RFP (Revised)
09/08/10	RFP
04/08/10	HERITAGE REVIEW
28/07/10	SPACE PLANNING REVIEW
DATE	ISSUED FOR



Project north

E.R.A.

E.R.A. Architects Inc., 10 St. Mary St, Suite 201, Toronto, Canada, M5T 1W7
T: (416) 964-4527 F: (416) 964-3211 info@era.ca or www.era.ca

Project
AUCHMAR COACH HOUSE

Address **88 Fennell Avenue, HAMILTON, ON**

For **CITY OF HAMILTON**

Project no. **05-008-4**

Scale **1 : 100**

Drawn by **JG, SB**

Reviewed by **JK, ER**

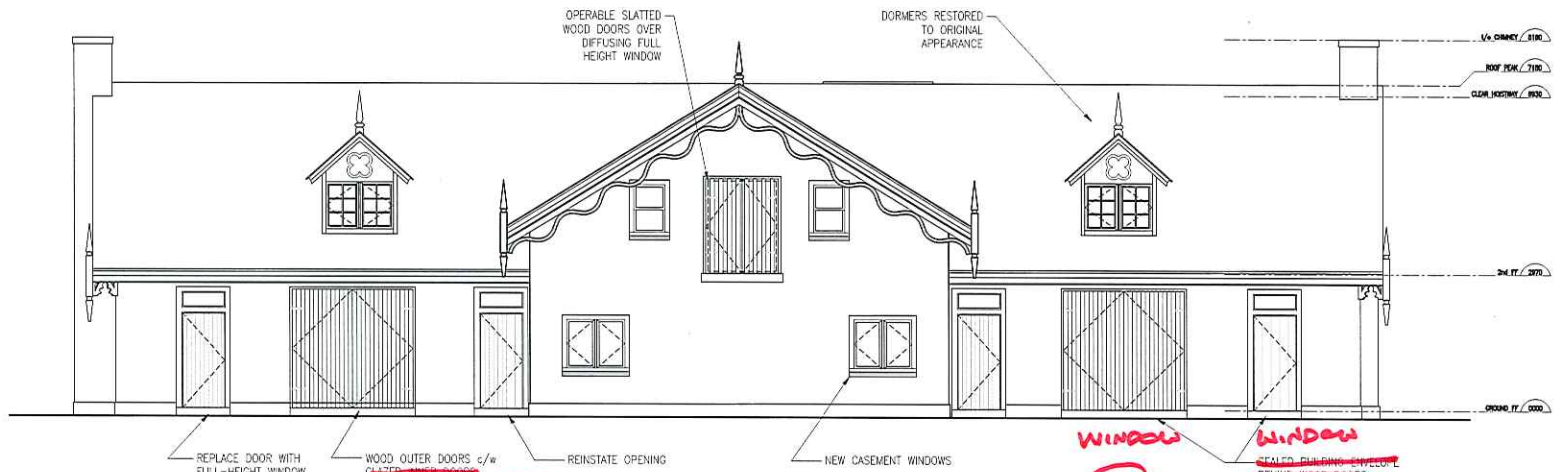
Drawing title

Second Floor Plan

Sheet no.

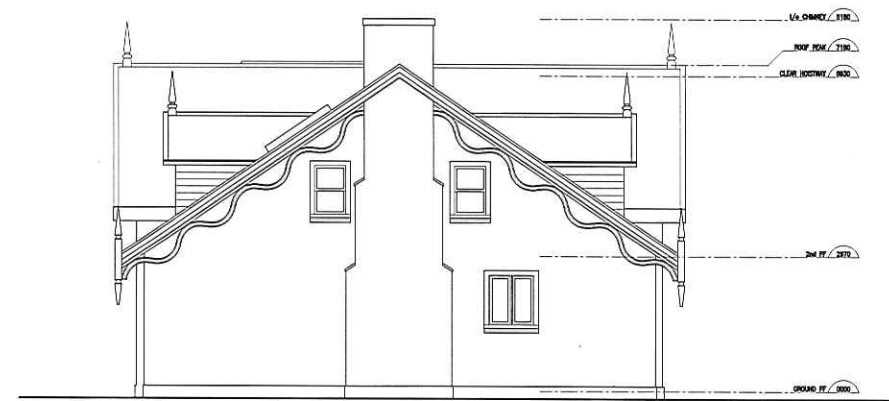
A102

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① → ② WINDOW
 WINDOW
 SEALED BRICKS - ENVELOPE
 CEILING - WOOD DOORS

West Elevation 1
Scale 1 : 100 A201



North Elevation 2
Scale 1 : 100 A201

FEBRUARY 23/2016

10/01/10	RFP (Revised)
09/08/10	RFP
04/09/10	HERITAGE REVIEW
DATE	ISSUED FOR

Project north	
E.R.A.	
E.R.A. Architects Inc., 18 St. Mary St., Suite 301, Toronto, Canada, M5T 1P6 T: (416) 593-4457 F: (416) 593-3511 info@era.ca www.era.ca	
Project	
AUCHMAR COACH HOUSE	
Address	88 Fennell Avenue, HAMILTON, ON
For	CITY OF HAMILTON
Project no.	08-008-4
Scale	1 : 100
Drawn by	JG,SB
Reviewed by	ER
Drawing title	

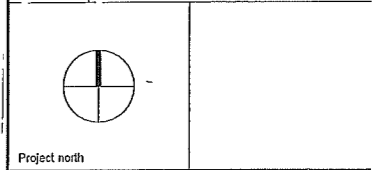
West & North Elevations

Sheet no.	A201
<small>This drawing is the property of E.R.A. Architects Inc. and may not be used or reproduced without written approval. Draw. is Engineering drawings before proceeding with work. The Contractor shall verify all dimensions and levels on site and report any discrepancies to E.R.A. before building work. Do not scale from the drawing. Use figure dimensions only. The Contractor is responsible for any changes made to the drawings without E.R.A.'s approval.</small>	

Appendix 7.10 – Mansion Pre-Concept Plan Option #3

SOUTH
ELEVATION
PRE-CONCEPT
PLAN
OPTION # 3

NOT TO
SCALE

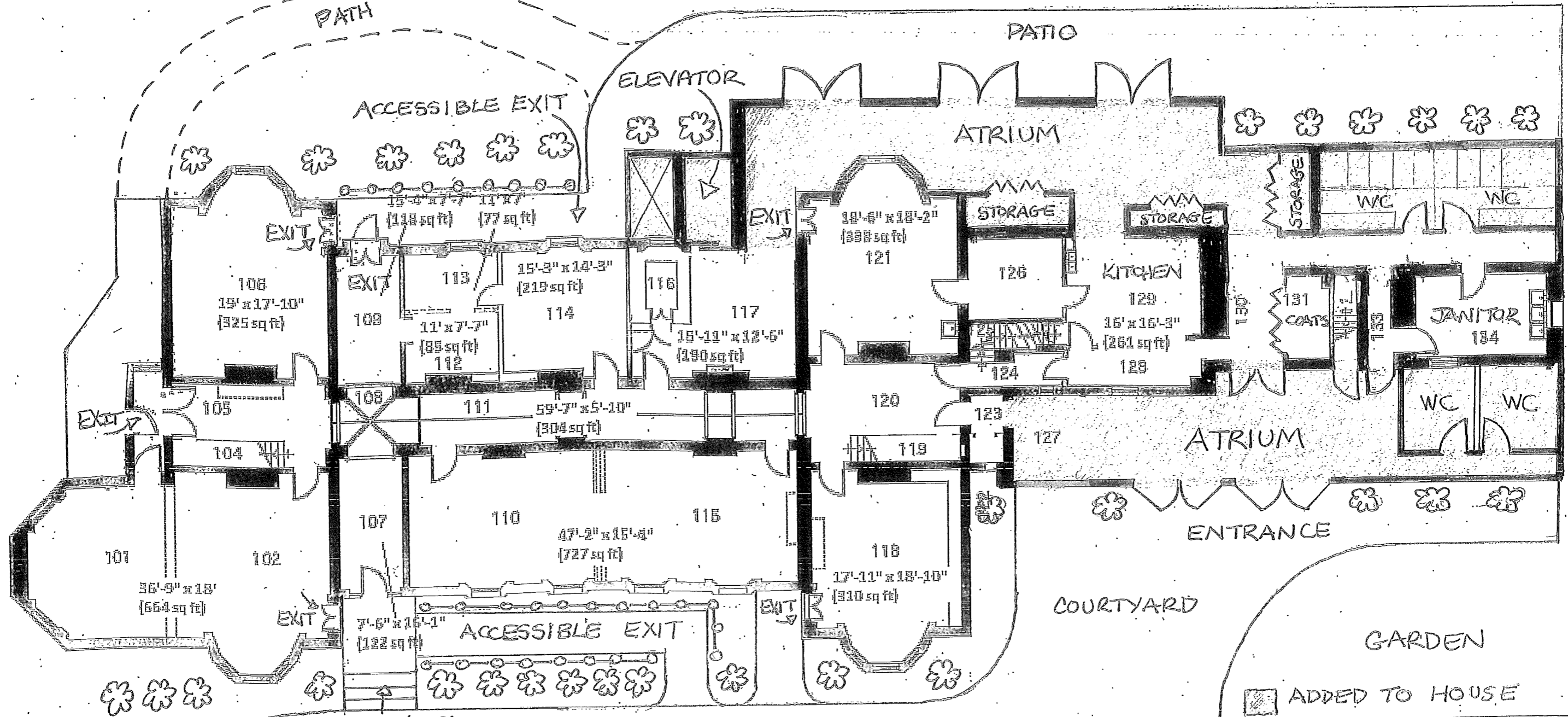


Project	AUCHMAR ESTATE
Address	88 Fennell Road, Hamilton
For	The City of Hamilton
Project no.	06-008-07
Scale	3"=1'-0"
Drawn by	TT, EG
Reviewed by	JK, ER
Drawing title	

SOUTH ELEVATION

Sheet no.

EXTERIOR PROGRAMMING SPACE



AUCHMAR, CITY OF HAMILTON

MANOR HOUSE GROUND FLOOR
NOT TO SCALE

PRE-CONCEPT PLAN
OPTION # 3

NORTH
ELEVATION
PRE-CONCEPT
PLAN
OPTION # 1
AND # 3



2013-05-22	COORDINATION
DATE	ISSUED FOR



Project north

Project

AUCHMAR ESTATE

Address 88 Fennell Road, Hamilton

For The City of Hamilton

Project no. 06-008-07

Scale 3"=1'-0"

Drawn by TT, EG

Reviewed by JK

Drawing title

NORTH ELEVATION

**AUCHMAR
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Architect: ERA

Cat: 730
File: RN-CD-RO
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B33 Conveying Systems	0.02	3 stp	\$60,000.00	\$180,000	\$1,071.43	\$235,000	12%
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C12 Fire Protection - included	0.00	0 m2	\$0.00	\$0	\$0.00		
C13 H.V.A.C.	1.00	168 m2	\$601.19	\$101,000	\$601.19		
C14 Controls - included	0.00	0 m2	\$0.00	\$0	\$0.00	\$101,000	5%
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NET BUILDING COST (Excluding Site)					\$8,476.19	\$1,424,000	72%
D SITE & ANCILLARY WORK							
D1 SITE WORK							
D11 Site Development	1.00	168 m2	\$297.62	\$50,000	\$297.62		
D12 Mechanical Site Services	1.00	168 m2	\$89.29	\$15,000	\$89.29		
D13 Electrical Site Services	1.00	168 m2	\$89.29	\$15,000	\$89.29	\$80,000	4%
D2 ANCILLARY WORK							
D21 Demolition	0.00	0 m2	\$0.00	\$0	\$0.00		
D22 Alterations	0.00	0 m2	\$0.00	\$0	\$0.00	\$0	0%
NET BUILDING COST (Including Site)					\$8,952.38	\$1,504,000	
Z GENERAL REQUIREMENTS & ALLOWANCES							
Z1 GEN. REQ. & FEE 15.0%							
Z11 General Requirements	10.0%			\$150,000	\$892.86		
Z12 Fee	5.0%			\$75,000	\$446.43	\$225,000	11%
TOTAL CONSTRUCTION ESTIMATE (Excluding Allowances)						\$1,729,000	87%
Z2 ALLOWANCES 15.0%							
Z21 Estimating Contingency	15.0%			\$259,000	\$1,541.67		
Z22 Escalation Allowance	0.0%	EXCLUDED		\$0	\$0.00		
Z23 Construction Allowance	0.0%	EXCLUDED		\$0	\$0.00	\$259,000	13%
GOOD & SERVICES TAX 0.0% EXCLUDED							
TOTAL CONSTRUCTION ESTIMATE (Including Allowances)						\$1,988,000	100%
GFA	168 m2				Cost/m2	\$11,833	
GFA	1,808 sf					\$1,099	

AUCHMAR - Revised Conservation Plan + Capital Cost Estimate

COST ESTIMATE UPDATE (CLASS D), FIRST QUARTER 2016
February 19, 2016

Note: Cost Estimates supplied by ERA Architects in 2006; updated for inflation in 2009 for Heritage Capital Projects City of Hamilton; updated for inflation by ERA in 2016

		Quantity	Unit	Rate	Estimated Total Project	SECTION TOTALS	Complete to date	Next phases	Comments
4.1	GROUNDS								
a)	Site development				Complete				
b)	Landscaping				603,000			\$603,000	
c)	Grading and Hard Surfaces				complete				
		15,000	sf	15	225,000			\$225,000	
					53,500			\$53,500	
d)	Accessibility upgrades	35	lf	1,500	52,500			\$52,500	
		45	lf	1,500	67,500			\$67,500	
	Section Total					\$1,001,500			
	General Requirements and fees	18.00%				\$180,270		\$180,270	
	Design and site conditions contingency	25.00%				\$250,375		\$250,375	
						\$1,432,145			
	Demolish 1960s convent and chapel, and dispose of off site					\$189,000		\$189,000	
	New 25-car parking area and driveway					\$110,000		\$110,000	
	New electrical, sewer, water and gas service connections to Fennell Avenue from Mansion (115 ft approx)					\$150,000		\$150,000	
	Total estimated Gounds costs					\$1,881,145	\$0	\$1,881,145	
4.2	GARDEN WALLS & GATES								
	Stabilized portions of Kitchen Garden wall (105 lf), 14 ft high, including foundations	105	lf	4,000	420,000		\$420,000		
	Stabilize remainder of Kitchen Garden wall (300 lf - 105 lf), including foundations	195	lf	4,000	780,000			\$780,000	
	Stabilize garden wall (950 lf), 10 high	950	lf	3,200	3,040,000			\$3,040,000	
	Remove vine and tree roots which are in contact with the wall. Ensure that no new trees are planted or allowed to seed next to wall.			Allowance	10,000			\$10,000	
	Install flashing to coping cap to prevent water ingress to masonry (standing sections)	1,250	lf	85	106,250			\$106,250	
	Restore Coach House Gate (updated information from Hamilton)				430,000		\$430,000		
						\$4,786,250			
	General Requirements and fees	15.00%				\$717,938	included	\$717,938	
	Design and site conditions contingency	25.00%				\$1,196,563	included	\$1,196,563	
	Total estimated Garden Walls and Gates conservation costs					\$6,700,750	\$850,000	\$5,850,750	

AUCHMAR - Revised Conservation Plan + Capital Cost Estimate

Note: Cost Estimates supplied by ERA Architects in 2006; updated for inflation in 2009 for Heritage Capital Projects City of Hamilton; updated for inflation by ERA in 2016

		Quantity	Unit	Rate	Estimated Total Project	SECTION TOTALS	Complete to date	Next phases	Comments
4.3	DOVECOTE								
	Restore as part of garden wall programme:								
	Masonry (updated 2009 to 2016 for inflation, 12%)				97,500			\$97,500	
	Roofing including roof structure (ditto)				40,500			\$40,500	
	Ventilator (ditto)				24,650			\$24,650	
	Woodwork including painting woodwork and trim (ditto)				9,500			\$9,500	
	Replace 2nd floor platform and provide new access ladder.				8,000			\$8,000	
	Subtotal					\$180,150			
	General Requirements and fees	15.00%				\$27,023		\$27,023	
	Design and site conditions contingency	25.00%				\$45,038		\$45,038	
	Total estimated Dovecost conservation costs					\$252,210	\$0	\$252,210	
4.4	COACH HOUSE								
4.4.1	SUBSTRUCTURE								
	Allowance for foundation masonry				25,000			\$25,000	
						\$25,000			
4.4.2	STRUCTURE								
a)	Roof								
	Allowance for repairs to eaves and structure				25,000			\$25,000	
	Repair wood framed dormers and sheathing		Brown	Allowance	10,000			\$10,000	
b)	Floors above grade								
	New 1 1/2" thick concrete topping to existing slab-on-grade		Brown		7,500			\$7,500	
c)	Floors below grade								
	N/A					\$42,500			
4.4.3	BUILDING ENVELOPE								
a)	Walls above grade								
	Minor stonework repairs and 25% selective repointing				100,500			\$100,500	
	Exterior trim replacement & restoration		Brown	25,000	27,000			\$27,000	
	Exterior painting (Doors and frames, windows, wood trim)		Brown	20,000	21,500			\$21,500	
b)	Walls at or below grade								
	N/A								
c)	Windows								
	Windows, skylights, glass, glazing & caulking		Brown	18,000	19,500			\$19,500	
	Repair of existing wood windows	18	no.	2,500	45,000			\$45,000	
	New narrow light double-glazed windows	7	no.	4,500	31,500			\$31,500	
	New double light double-glazed windows	4	no.	8,000	32,000			\$32,000	
d)	Exterior Doors								
	New frame exterior hardwood doors & frames, with hardware	16	no.	4,000	64,000			\$64,000	
	New glazed framed hardwood entrance door and frame, with hardware	1	no.	5,500	5,500			\$5,500	
e)	Roof Covering								
	Remove existing and replace wood roof shingles, including restored roof dormers, with 1/2 round galvanized gutters, round downspouts & flashings		Brown	73,000	92,000			\$92,000	Should this be included in "Next Phases"?
	Cladding to elevator shaft above roof level		Brown	6,800	8,200			\$8,200	
f)	Rainwater Disposal								
	See roof								
g)	Chimneys and Projections								
	Replicate missing wood finials at eaves and ridges	7	no.	8,000	56,000			\$56,000	
	Replicate missing wood finials to roof dormers	4	no.	3,000	12,000			\$12,000	
	Restoration of gable fretwork	4	no.	10,000	40,000			\$40,000	
	Repair and resecure existing finials	3	no.	3,000	9,000			\$9,000	
	Restoration of dormer wood details	4	no.	3,500	14,000			\$14,000	
						\$577,700			

AUCHMAR - Revised Conservation Plan + Capital Cost Estimate

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		Quantity	Unit	Rate	Estimated Total Project	SECTION TOTALS	Complete to date	Next phases	Comments
4.4.4 INTERIORS									
a)	Partitions								
	Carpentry work (wood studs & beams) etc.		Brown		15,000			\$15,000	
	Drywall, insulation & taping to partitions, bulkheads & ceilings		Brown		42,000			\$42,000	
	6 mil tempered glass partitions, c/w with hollow metal framing		Brown		31,000			\$31,000	
	8" blockwork & foundation footings to elevator shaft		Brown		15,500			\$15,500	
b)	Interior Doors								
	New interior hardwood veneer doors & frames		Brown		30,000			\$30,000	
	Finish hardware (allowance)		Brown		22,000			\$22,000	
									\$155,500
c)	Ceiling & Wall Finishes								
	Painting & decorating		Brown		21,000			\$21,000	
d)	Floor Finishes								
	Finish flooring & baseboards		Brown		30,000			\$30,000	
									\$51,000
d)	Fittings and Fixtures								
	Kitchen counters & cabinets		Brown		25,000			\$25,000	
	Engineered glazed sectional railings (allowance)		Brown		12,500			\$12,500	
f)	Equipment								
g)	Conveying Systems								
	New elevator for accessibility		Brown		135,000			\$135,000	
									\$172,500
4.5.5 SERVICES									
a)	Mechanical								
	Plumbing & drainage		Brown		31,000			\$31,000	
	Waterline for sprinkler system (allowance)		Brown		30,500			\$30,500	
	HVAC system		Brown		166,500			\$166,500	
	Provide sprinkler system - 40 heads and supporting mechanical.	40	no.	500	20,000			\$20,000	
									\$248,000
b)	Electrical								
	Lights & lighting		Brown		25,000			\$25,000	
	Power switches, outlets, controls & sensors		Brown		128,000			\$128,000	
	Rough-ins for security system & alarms etc.		Brown		9,600			\$9,600	
									\$162,600
	Subtotal								\$1,434,800
	General Requirements and fees	15.00%							\$215,220
	Design and site conditions contingency	25.00%							\$358,700
	Total estimated Mansion conservation and upgrade costs								\$2,008,720
								\$0	\$2,008,720
4.5 MANOR HOUSE									
4.5.1 SUBSTRUCTURE									
a)	Foundations								
	Repairs at west end				complete				
	Allowance for additional foundation repairs				50,000			\$50,000	
									\$50,000
4.5.2 STRUCTURE									
a)	Roof								
	Allowance for additional structural repairs				50,000			\$50,000	

AUCHMAR - Revised Conservation Plan + Capital Cost Estimate

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		Quantity	Unit	Rate	Estimated Total Project	SECTION TOTALS	Complete to date	Next phases	Comments
b)	Floors above grade	Dry Rot removal and replacement on ground level floor structure.			10,000			\$10,000	
		Allow for repair of 20% (20% x 1500LF) rotted rafter ends in eaves and valleys			complete				
		4,900	sf	45	220,500			\$220,500	This work can be mostly carried from the basement. On the second floor strengthening would severely impact heritage plaster, including in the principal rooms
c)	Floors below grade								
						\$280,500			
4.5.3 BUILDING ENVELOPE									
d)	Walls above grade	Conserve stucco finish and repaint on Mansion			165,000		\$165,000		
		Conserve stucco finish and repaint East Wing to match Mansion			39,500			\$39,500	
e)	Walls below grade								
f)	Windows	Conserve and repaint on Mansion			508,000		\$508,000		
		43	pr.	6,000	258,000			\$258,000	
		14	no.	6,500	91,000			\$91,000	
g)	Exterior Doors	Review and upgrade security provisions (10 doors to manor, 2 sets of doors to rooms 106 and 109 are not secure, and 4 sets of doors to 102, 118 and 121 should be checked.) - note that security system has been installed.			complete				
		5	no.	1,500	7,500			\$7,500	
		Restore exterior ironwork (doors/lanterns). Updated for inflation 12%.			13,970			\$13,970	
		4	no.	3,000	12,000			\$12,000	
a)	Roof Covering	Pitched roofs, flashings and rainwater disposal			110,000		\$110,000		
		2,100	sf	18	37,800			\$37,800	
		160	lf	60	9,600			\$9,600	
c)	Rainwater Disposal	Mansion			25,000		\$25,000		
		3	no.	4,000	12,000			\$12,000	
		All downpipes discharge at grade; none connected to storm drain system			complete				
b)	Chimneys and Projections	Rebuild of 2 west and 3 central chimneys on Mansion			336,000		\$336,000		
		2	no.	60,000	120,000			\$120,000	
		2	no.	25,000	50,000			\$50,000	
h)	Exterior Stairs	Front entrance stone steps and landing to Mansion rebuilt			Complete				
						\$1,795,370	\$1,144,000	\$651,370	
4.5.4 INTERIOR									
a)	Partitions	No allowance until renovation scheme proposed							
b)	Doors	Repair and refinish clear finished doors and surrounds, ground and second floors		40	no.	3,000	120,000	\$120,000	
		12	no.	800	9,600			\$9,600	
		40	no.	750	30,000			\$30,000	
		12	no.	500	6,000			\$6,000	

AUCHMAR - Revised Conservation Plan + Capital Cost Estimate

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		Description	Quantity	Unit	Rate	Estimated Total Project	SECTION TOTALS	Complete to date	Next phases	Comments	
c)	Staircases	Repair and touch up clear finish on 2 principal stairs in Mansion	2	no.	5,000	10,000			\$10,000		
		Repair and repaint 2 stairs in East Wing	2	no.	1,500	3,000			\$3,000		
d)	Interior Ceiling & Wall Finishes	Restore interior plaster finishes - crack repair / decorative elements / water damaged areas, in basement, prepare and repaint	4,900	sf	15	73,500			\$73,500		
		Restore interior plaster finishes - crack repair / decorative elements / water damaged areas, in ground and second floors, prepare and repaint	13,277	sf	22	292,094			\$292,094		
e)	Floor Finishes	Remove carpets, make good wood flooring, sand and refinish on ground and second floors	10,650	sf	8	85,200			\$85,200		
		Replace 20% of wood flooring on ground and second floors to match existing, sand and clear finish	2,650	sf	15	39,750			\$39,750		
		Tile repairs in washrooms.	4	no.	3,000	12,000			\$12,000		
c)	Decorative Woodwork	Restore clear finishes on wood column shafts, deep baseboards and paneling			Allowance	100,000			\$100,000		
		Restore missing cabinetry in Library.			Allowance	35,200			\$35,200		
							\$816,344	\$0	\$816,344		
4.5.5 SERVICES											
a)	Mechanical	Replace existing steam boiler, burner and controls.				complete					
		Add water softener and chemical treatment for steam boiler.				complete					
		Replace rusting condensate piping in basement.				42,900			\$42,900		
		New heating distribution and controls, piping and air conditioning to maintain and preserve interior finishes, ground and second floors	13,277	sf	35	464,695			\$464,695		
		New heating distribution and controls, piping and air conditioning to maintain and preserve interior finishes, basement	4,900	sf	28	137,200			\$137,200		
		Upgrade plumbing.				55,000			\$55,000		
		Provide sprinkler system - 150 heads and supporting mechanical.	150	no.	350	52,500			\$52,500		
		4" sprinkler main and controls.				75,000			\$75,000		
b)	Electrical	Conduct tests on all terminals for hot spots on an annual basis.				complete					
		Replace electrical wiring, outlets, switches, fixtures and controls.	18,175	sf	25	454,375			\$454,375		
		Provide smoke detectors and carbon monoxide detectors				17,600			\$17,600		
		Provide fire alarm system complete with pull stations, exit lights and alarms				24,200			\$24,200		
							\$1,323,470	\$1,474,500	\$1,323,470		
Subtotal							\$4,265,684		\$2,791,184		
General Requirements and fees			15.00%				\$639,853		\$639,853		
Design and site conditions contingency			25.00%				\$1,066,421		\$1,066,421		
Subtotal estimated conservation costs							\$5,971,958				
New Atrium addition to Mansion including washrooms and elevator to 3 floors							\$1,988,000		\$1,988,000		
Total estimated Mansion conservation and upgrade costs							\$7,959,958		\$7,808,928		
TOTAL ESTIMATED COSTS FOR ALL WORKS							11,668,384	\$18,802,783	\$1,994,000	\$15,826,913	

11,668,384 not including mark ups

\$17,820,913 K229 + L229

