

## Applicant Information

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The **Capital Grants** program provides matching grants to assist with buying property, final-stage design, construction, repair, renovation, installation of fixed equipment, or other capital improvements of cultural facilities in Massachusetts.

## Applicant Organization Information

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Review the applicant information. If you need to update the Organization Information, use the Note feature on the left to contact a Mass Cultural Council staff person for help.

**Legal Name:** Middlesex Canal Association, Inc.

**Doing Business As:**

**Physical Address:**

**Address 1:** 71 Faulkner Street

**Address 2:**

**City:** Billerica

**State:** MA

**ZIP:** 01862-1540

**Mailing Address (if different):**

**Mailing Address 1:**

**Mailing Address 2:**

**City:**

**State:**

**ZIP:**

**Parent Organization:** Grant Seeking Organizations

**Fiscal Agent:**

Please note, organizations are required to provide a Massachusetts physical address. A PO Box can be provided for the mailing address, but not the physical address. Organizations that do not have a facility or office typically provide the address of the primary person leading the organization or group, such as the board chair, staff person, or lead volunteer for the group.

If you see "Grant Seeking Organization" listed as your parent organization, this means that you do not have a parent organization and you can disregard it.

## Applicant Website

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Review the web address. If you need to update it, you can do so in your Organization Profile.

**Website:** <http://www.middlesexcanal.org/>

## Grants Management System Legal Status

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When your organization registered in our grants management system, we were provided with the below legal status. If you believe this information is not current, use the Notes feature on the left to contact a Mass Cultural Council staff person for help.

Nonprofit Organization

## Primary Contact

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Review the applicant information. The Primary Contact is responsible for all communications regarding the application, including questions and contracts. If you need to update the Primary Contact information you can do so in your Profile. Click Home button in upper right corner to get to My Profile button.

J. Jeremiah Breen  
jbreen5@verizon.net  
978-688-4322

## Executive Director Name (first and last)

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J. Jeremiah BREEN

## Executive Director Title

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president

## Executive Director Email

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jbreen5@verizon.net

## Executive Director Phone

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978-688-4322

## How many years has this Executive Director (or equivalent) been serving?

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11.0

## Project Information

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Please use paragraph breaks where necessary when writing your narrative responses below.

## Description

In one or two sentences please state the purpose of the grant.

Aid in construction of the new Middlesex Canal Museum-Visitor Center now being built at 2 Old Elm St, Billerica MA 01862. The project began in 2014 with the gift of a 150-year-old woolen cloth storehouse, and by August 2023 after more than \$2 million dollars spent, the work is nearing completion.

## Facility Description

Describe the facility and the project that is the subject of this application. (Feel free to include pertinent background information including challenges and opportunities. You will be able to describe your programs and services later in the application.)

Museum-visitor center for the Middlesex Canal, Billerica & Bedford Railroad, and Billerica Mills Historic District. The center has a mile of canal for walking east and west of it, an observation deck overlooking the summit pond and Billerica Falls of the Concord River. Henry David Thoreau describes in *A Week on the Concord and Merrimack Rivers* hearing the Falls and leaving the Concord to journey on the canal to the Merrimack. The 150-year-old, dilapidated storehouse was accepted as a gift in 2014 because the location was the best on the 27-mile canal, the site of the ceremonial groundbreaking for the canal in 1794.

A general contractor's first estimate was \$600,000. A year later, after raising the \$600,000 and then meeting with the contractor, his second estimate was \$1 million. Recently, after more than \$2 million spent, Cogley Construction said \$800,000 of work remained. The good news is that next year after ten years, the new museum-visitor center will be complete in a new riverside park.

## Please indicate whether the project includes any of the following. (Check all that apply)

Fire & Safety System Upgrades, Energy Efficiency Measures / Green & Sustainable Building Practices, Americans with Disabilities Act (ADA) Compliance

**If you have already been a recipient of a Cultural Facilities Fund Capital grant, please describe how this project is distinct from the previously funded project.**

The first general contractor's estimate was \$600,000 in 2014, and the second was \$1 million after \$600,000 had been pledged. Now after more than \$2 million spent, the completion of the museum-visitor center is in sight. A many weeks delay in construction was a consequence of the decision to change the heating system from gas furnace to heat pump: sub-contractors who are able to design and build the system for a 6,000 sq. ft. building are few and very busy. Presently, the architect's engineers are checking the design and revising the building permit plans for the change to heat pump. When the general contractor returns from Florida in March, he will complete building fit-out and renovate the parking area as required in the Billerica Conservation Commission's Order of Conditions. With the required landscaping, a public riverside park will have been built.

In short, the surprises that come with renovating a 150-year-old building and re-design of plans to accommodate improvements are in the past.

**Briefly tell us how your organization is primarily concerned with the arts, humanities or sciences.**

The Association exists to develop the historic Middlesex Canal for public recreational and educational use; to publish historical, literary, and scientific works concerning the Canal; and through such means educate and publicize to the public the history of the Canal and its part in the Industrial Revolution in the United States.

## Proposed Project

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**Project type (select all that apply)**

New facility construction/expansion

**Indicate the approximate stage your project is in**

In construction/Implementation

**Total Project Costs**

\$3,000,000

**Grant Amount Requested**

\$200,000

## Organization Information

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Please use paragraph breaks where necessary when writing your narrative responses below.

### Operating Expenses

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Total operating expenses for your organization's most recently completed fiscal year.

Municipalities and colleges/universities: Please provide operating expenses, FTE's and summary of programs for the cultural facility only.

\$22,000.00

### Number of full-time equivalents (FTEs) employed at your organization.

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0

**Provide a brief summary of the organization, its programs, and services.**

The Association was incorporated in 1964 and is the successor to the Middlesex Canal Co. incorporated in 1793. The Association has as its motto, ". . . this work designed for the benefit of the present & all Future Generations", words from the invocation at the groundbreaking for the canal. Three notable achievements since 1964 have been (1) creation of a Special Collection in 1971 at the UMAss Lowell Library to make available to the public the records of the Middlesex Canal Company. (2) establishment in 1977 by the legislature of the Middlesex Canal Commission with authorization for a Middlesex Canal Heritage Park. The legislature has funded the Commission with \$600,000 since 1977. and (3) opening in 2001 of the museum-visitor center at the summit pond of the canal. The future center is located at the spot on the summit pond/Concord riverbank of the ceremonial first shovelful of the groundbreaking in 1794. Part of the invocation at that groundbreaking became the motto of the Association, ". . . for the benefit of the present & all Future Generations."

Services for the present generation, two centuries after John Hancock and his compatriots began the canal, are a website and Facebook page, the journal, Towpath Topics, published three times-a-year, with all 60 years online at middlesexcanal.org; walks on the towpath, twice a year, co-sponsored with the Appalachian Mountain Club; bike tours of the canal, twice a year; guest speakers at Association meetings, three times a year; host 16 classes of 3rd graders for a history lesson with funding from the Barker Foundation; staff the visitor center and have it open to the public, 100 days every year. More than 14 acres has been deeded or otherwise been given for use as the Commonwealth's Middlesex Canal Heritage Park between Lowell and Boston. Incidental services, not scheduled, not programmed, occur.

**Facility Information**

Please use paragraph breaks where necessary when writing your narrative responses below.

**Subject Facility**

**Name of Subject Facility**

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Middlesex Canal Museum-Visitor Center

**Street Address of Subject Facility**

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Enter the physical address of the subject facility.

2 Old Elm Street

**City of Subject Facility**

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Enter the physical address of the subject facility.

Billerica

**Zip Code of Subject Facility**

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01862

**Square Footage of Subject Facility**

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5760

**Type of facility**

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Other - Please describe

**Other**

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Historic site and museum-visitor center

**Type of ownership of the facility**

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Owned

**Who is listed as the owner on the title, if applicable?**

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Middlesex Canal Association, Inc.

**Community Impact**

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Please use paragraph breaks where necessary when writing your narrative responses below.

**Describe the community need for this project. This can include how you engage the communities you serve.**

A public building with public parking with easy access to the Concord River welcoming visitors.

**Describe how your organization brings the public into the facility and impacts tourism. We define tourism as audiences traveling 50 miles or staying overnight.**

"The Middlesex canal, uniting the waters of [the Merrimack River] with the harbor of Boston, is however the greatest work of the kind which has been completed in the United States." Report on Public Roads and Canals by the US Secretary of the Treasury to Congress, April 4, 1808. Retrieved from the internet, <http://oll.libertyfund.org/titles/2046>.

The visitor center is on the bank of the canal and of the Concord River summit pond, the highest point of the canal. A mile of the walkable Thoreau Towpath begins at the visitor center. Rte. 3 already has signs directing visitors to the center, less than twenty minutes away. The new center will have signs on I-495, less than fifteen minutes away. Aside from those visiting the greatest -, approximately 10% are from out-of-state visiting the greatest, this past Covid-19 December 2020, visitors were from San Diego and Pennsylvania --, the attraction is a riverfront park on Thoreau's Concord River with public rest rooms and dog walk. I-95 is a major north-south route with no rest areas.

Brief description of canal

Incorporated in 1793 with John Hancock as the first proprietor, the canal connected the Merrimack River at Lowell with the Charles River at Boston by a ditch 3½' deep, 30' wide, 27 miles long with eight aqueducts, twenty locks, and fifty bridges. It was the greatest work of its kind in the US until the Erie Canal, and its low-cost transportation of thousands of bales of cotton along with waterpower was the basis for the cotton mills of Lowell, Nashua, and Manchester. The canal operated for 50 years, until the one horsepower canal boat quickly lost to a new competitor, the 30 horsepower steam locomotive. Lowell National Historical Park has a committee preparing for Lowell's bicentennial celebration in 2026. The Middlesex Canal Association is a major celebrant.

**Describe local support for the project. This can include but not limited to participation in programs, memberships, financial support, social media and local press.**

Community preservation grants, \$380,000 total as of Dec 2023.

Town of Billerica pays for telephone, gas, and electricity.

ARPA earmark of \$50,000.

Private donations of \$1,500,000 as of Dec 2023.

The Sudbury, Assabet, Concord River Stewardship Council granted \$11,500 total as of Dec 2023.

## Financial Capacity

Please use paragraph breaks where necessary when writing your narrative responses below.

**Describe the financial need for this grant.**

As of December 2023, the MC Association has cash plus stock, total \$238,000 with the majority, \$145,000, restricted in the endowment fund. The general contractor has said \$800,000 will be needed to complete the project.

**Describe how the organization will raise the funds required to complete the project.**

On December 7, 2023, Billerica's Community Preservation Committee voted that the Middlesex Canal Association was eligible for another grant. This would be in addition to the \$380,000 previously granted. Private donations are expected to continue to be timely received. More than \$2,000,000 has been raised and spent as of Dec 2023. The \$800,000 to complete the project in 2024 is proven by past performance.

**What percentage of 1:1 matching requirement is committed at the time of this application submission?**

100%

**What percentage of the total project costs are committed?**

70%

**Please describe how you fund ongoing capital maintenance and replacement costs of your facility.**

The rent at 71 Faulkner St has been \$1,700/month for many years, funded by dues, annual appeal, and donations. The non-endowment cash in the bank is ~ 90,000. Likely cash reserve will increase once the monthly rent is ended.

**If you are expanding a current facility, building a new facility, and/or increasing programming that will have an impact on operations, describe how you will financially support the new venture.**

"Dues, annual appeal, and donations."  
The possibility exists to rent the ground floor for parties but the Town would have to give permission.

## Planning

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Please use paragraph breaks where necessary when writing your narrative responses below.

**Are you making capital improvements to a building or site that is currently offering cultural programming?**

Yes

**Do you have a capital needs assessment for your facility/s, done either in-house or by a third-party qualified professional? (if yes, please submit it with your supplemental materials)**

No

**Describe how you identify building repair and upkeep and how this project fits into those overall facility plans.**

With twenty years of experience of operating a museum-visitor center, the volunteers are well able to do maintenance with the occasional contractor.

**Are you either expanding square footage of your current programmable space, moving into a new space, or embarking on a new construction project?**

Yes

**Do you have a feasibility or business plan for this expansion? (If yes, please upload plans into the Additional Materials tab.)**

No

**Please summarize any planning you have done to support the expansion. This could include the community demand for the new programming or space, and what impact the expansion will have on operations.**

The move to 2 Old Elm from 71 Faulkner, 400' between, was due to the historic location on the Concord River where the ceremonial groundbreaking for the canal was in 1794. The size of the 2½ story Old Elm St building was not significant in the decision. Nor the fact that a free standing, prominent building at a busy Concord River bridge crossing would attract more visitors.

## Implementation

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Please identify key project team members by entering information in the “Members Details” window below, and by uploading Resumes, CVs, or other summaries of qualifications.

## Key Project Team Members

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Click the “Members Details” button below and a pop-up window will appear (if it does not appear please check your browser’s pop-up blocker). Please enter the information for up to four key project team members in the table. These can include third-party consultants or contractors who are involved in the planning, design, construction, or renovation, etc. Be sure to click “Save” before closing the window.

### Resumes, CVs, or other summaries of qualifications

Please upload for all key project personnel identified in the "Members Details" table above, and any other relevant team members.

[Please note: Project managers and general contractors must meet insurance and bond requirements appropriate to the nature and size of the project.]

[Resume\\_\\_CV\\_\\_other\\_general\\_contractor.pdf](#)

33.5 KB - 12/11/2023 3:55AM

[Resumes\\_\\_CVs\\_architect\\_Caveney\\_Overview.pdf](#)

4.8 MB - 12/11/2023 3:55AM

Total Files: 2

### Describe the roles of the third-party implementation team members in this project.

The building committee of the board of directors of the Middlesex Canal Association has four members, J. Jeremiah Breen, Betty Bigwood, Tom Dahill, and Dick Hawes. Resumes are in the section Additional Materials, Board List, at directors, curriculum vitae.

The building committee is the owner's representative, making decisions for the contractor and architect, and in this project, sometimes hiring sub-contractors. The owner's representative is often hired by contract. The Association used the volunteer building committee saving the cost of a professional representative. Dick Hawes is particularly qualified to represent the owner as a Town of Billerica resident of many years experience with town government regulators.

### Members

Name	Title	Organization	If a third party, are they currently under contract?
Bill Cogley	general contractor	Cogley Construction	Yes
Christina McMahon	lead architect	Caveney Architectural Collaborative	Yes

**Describe how the project will be ready to proceed within 12 months. Be specific about any preparation that supports your implementation timeline (e.g., contracts, design plans, project planning).**

The project began in 2014 with the gift of a 150-year-old woolen cloth storehouse, and by December 2023 after more than \$2 million dollars spent, the work is nearing completion. The decision to change from gas heating to a heat pump has caused a delay as experienced contractors for commercial projects were busy and not interested. When New England Cooling Towers, Inc., submitted a \$143,000 contract with a Mass Save NGrid \$40,000 rebate, the architect and team of utility engineers who had designed and given their seal of approval to the gas furnace design had to learn about heat pumps and approve changes on the building permit plans for the new heat pump system. Johnson Engineering after many months submitted on December 7th an invoice for \$3,135 for changes to the plans. The engineers are finally revising museum construction plans.

## Additional Materials

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The following materials are required. Please upload each file clearly according to the bolded text and name the files clearly.

### **Budget Document**

Upload a Project Budget for a Capital Project, or a Planning Budget for Feasibility/Technical Assistance Project. Please list both the "sources" and "uses" of funds in the budget. In the "source" column indicate whether the funds are: "committed", "pledged", or "projected". In the "use" column indicate whether the costs are based on: a "contractor bid", "architect estimate", or "in-house estimate".

See a [sample Capital Project budget \(XLS\)](#).

**Project\_Budget\_8\_\_N\_B\_\_large\_Optional\_Materials.pdf**

118.8 KB - 12/13/2023 6:01AM

Total Files: 1

## Timeline

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Be sure to include the scope-of-work accompanied by dates.

[Timeline\\_1.pdf](#)

15 KB - 12/13/2023 6:20AM

Total Files: 1

**Financial Information****Nonprofit Organizations:**

- Audited financial or draft audit statements for the two most recent fiscal years. (If your organization's annual budget is less than \$500,000 and no audited financials are available, please provide 990's or a review statement by the accountant, or internally prepared income and expense statements and balance sheets for the two most recent years.)
- Year-to-date Income Statements and Balance Sheets since your last audit, accountant's review or 990.

**Municipalities:**

- Facility-specific operating financials for the last two years for the subject facility. Municipal financial audited statements are not required.

**Colleges and Universities:**

- Audited financial statements for the two most recent fiscal years.
- Facility-specific operating financials for the last two years for the subject facility.

[Financial\\_-\\_220315\\_Form\\_990\\_FYE\\_4-30-2021\\_public\\_PASSWORD\\_76731\\_.pdf](#)

460.3 KB - 12/13/2023 6:32AM

[Financial\\_-\\_230220\\_Form\\_990\\_FY\\_end\\_April\\_30\\_2022\\_DRAFT\\_PASSWORD\\_76731.pdf](#)

395.4 KB - 12/13/2023 6:32AM

[Financial\\_-\\_Most\\_Recent\\_treas231206.xlsx](#)

53 KB - 12/13/2023 6:32AM

Total Files: 3



## Lease, deed, or ground lease for your facility

If applicable.

Leases must be an arm's length transaction and not between family members.

For multi-use spaces (civic, recreational, health, worship, etc.) – there must be a lease or MOU for a dedicated separate space that is primarily concerned with the arts, humanities and/or sciences and the applicant has the legal authority to make the capital improvements requested in this application per the terms of the lease.

[Deed\\_as\\_recorded.pdf](#)

174.8 KB - 12/13/2023 6:39AM

Total Files: 1

## Planning Materials

Encouraged for acquisition, expansion of an existing building and/or programs, and new construction. The types of planning documents that will be helpful are financial projections over multiple years for the new venture; evidence of the "demand" for the new space/programming; what is the plan for operating the space including the programs and staffing; and how the space will be financed/funded initially and over time.

## Signed Purchase & Sale Agreement (P&S)

The P&S is only required if you are acquiring property. The P&S is NOT a requirement at the time the application, but will be a condition if you are awarded a grant. If you do have a P&S in hand, please upload.

**Board List (and board member affiliations if available)**

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[DIRECTORS\\_curriculum\\_vitae\\_1\\_updated\\_with\\_Dick\\_Hawes.pdf](#)

34.3 KB - 12/12/2023 5:38AM

Total Files: 1

**Images**

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Include images of the facility as well as specific areas of work. You can add a caption/title by clicking on the "Properties" button under the image after its been uploaded and editing the "Title" field.

**Photo Library**

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"May the Eye of Wisdom and the Eternal Mind aid this work designed for the benefit of the present & all Future Generations," prayed Loammi Baldwin. September 10, 1794, Billerica, Massachusetts.

0\_31\_\_210831\_Christina\_white\_rendering\_CC\_1040\_with\_invocation.jpg





View from south, Oct. 20, 2019  
Groundbreaking practice during topath walk

191020\_sixty\_walkers\_\_GROUNDBREAKING\_\_with\_note.jpg



Location of 400' long floating towpath on summit pond between 2 Old Elm St and causeway. Dilapidated roof has been removed from 2 Old Elm.

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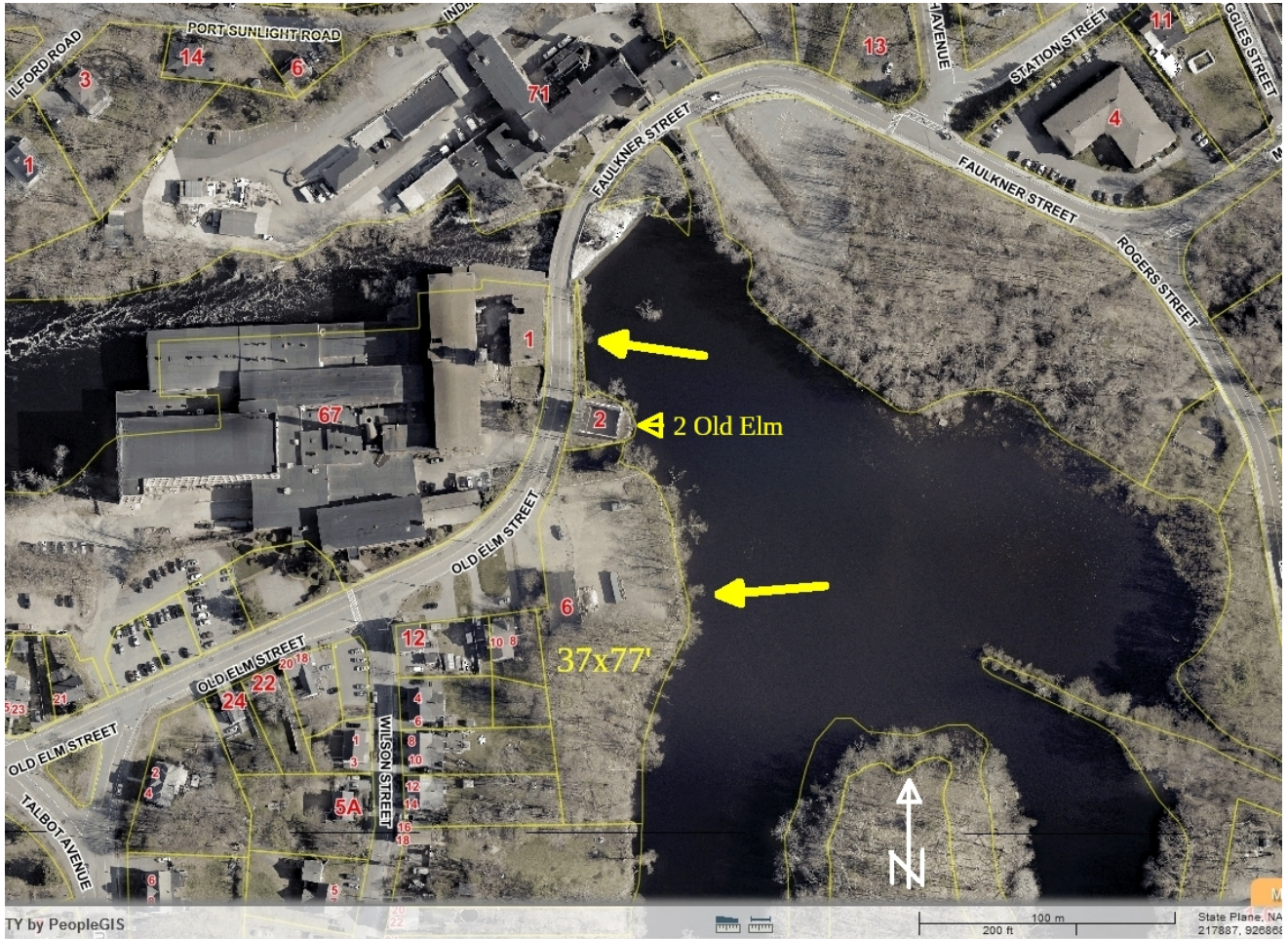






Tour group, twice a year bike tour of canal





Aerial view of 2 Old Elm St location on summit pond of the Middlesex Canal. The summit pond is formed by the Concord River dam





Ribbon cutting in celebration of the new deck overlooking the summit pond. Interpretative panel is under the ribbon.

## Optional Materials

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Application Summary:  
FY24-CF-CAP-76628

You have the option to submit any additional materials you think will help the panel review your project.

[2023\\_Middlesex\\_Canal\\_Museum\\_and\\_Visitor\\_Center\\_Cultural\\_Facilities\\_Fund\\_Support\\_Letter.pdf](#)

72.4 KB - 12/14/2023 5:26PM

[211005\\_Lowell\\_Sun\\_article\\_on\\_internet.pdf](#)

30.5 KB - 12/14/2023 1:58AM

[Press\\_\\_1\\_ribbon\\_cutting\\_Mary\\_Leach\\_Minuteman\\_wicked\\_local\\_.pdf](#)

257.5 KB - 12/14/2023 1:58AM

[Project\\_Budget\\_6\\_granted.ods](#)

37.5 KB - 12/13/2023 5:46AM

[letter\\_\\_Annual\\_Appeal\\_.pdf](#)

145.2 KB - 12/14/2023 1:58AM

Total Files: 5

## Acknowledgement

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### Ready to Submit?

Once you click "Submit" below, you will no longer have access to make changes to your application. A copy of your application will be sent via an email attachment upon submission.

**Please note: You have not successfully submitted your application until you see the following message: "Congratulations - You have successfully submitted your application."**

**Authorized Signature: I certify that all the information contained in this application, including all supporting documents and materials, is true and correct to the best of my knowledge. I hereby release Mass Cultural Council, its members, and employees, from any liability and/or responsibility concerning the submission of materials to this program. In addition, I agree that the required public acknowledgment will be given to Mass Cultural Council if this application is approved. I understand that failure to respond to any of the items requested in this application may seriously hinder its consideration. I certify that we are committed to the completion of the proposed activities in compliance with legal requirements and granting procedures and will file the report required by the Mass Cultural Council.**

**Clicking "submit" below serves as an authorizing electronic signature.**

### Attestation

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I agree