

Heritage Alliance Board Meeting Minutes – DAR Grant for Duncan House

E-Meeting December 6, 2022 – December 28, 2022

December 6, 2022 – Fred Counts, Board President

Good Afternoon, Board Members,

I hope you've all been well and are enjoying the holiday season. As we've discussed, the Duncan House is in dire need of wood repair and paint to address leakages that, left unaddressed, may lead to costly structural damage. Anne has received bids from both Chris Basar of Architectural Restoration & Paint, Inc, and J. Ross Painting. Both businesses have done recent work on historic structures in Jonesborough: Chris Basar's firm recently wrapped up exterior repairs at the Eureka Inn, and J. Ross recently completed exterior restoration work at the Chester Inn & State Historic Site.

Chris Basar's bid has come in quite a bit higher than J. Ross's - \$8k higher, in fact. I've attached an email from Chris to both Anne and I explaining the cost difference. I've also included a bid from Chris that matches J. Ross's bid, but without the needed carpentry work. It would behoove the board to approve both painting and carpentry work now to avoid added expense of carpentry repair in the future.

Our Executive Director has applied for a matching grant for this project, and the grant is due by the end of the month, hence why we're having an E-Meeting and not waiting to discuss this until the February meeting.

Before looking for a motion to accept either bid, I would like for us to carefully read the attachments I've provided and have a discussion about both bids. I would like for us to wrap up discussion and have a motion by the end of this week, if at

all possible. This will allow time for Anne to complete the matching grant with as much information as possible.

First attachment: Chris Basar's original bid.

Second attachment: J. Ross' bid.

Third attachment: Email from Chris explaining \$23k quoted cost.

Fourth attachment: Chris Basar's revised bid, showing only paint work.

I now open the floor to discussion. Please reach out to me for any additional information you may need.

Best,

Fred

December 7, 2022 – Pat Wolfe, Treasurer

If I am reading the J. Ross bid correctly, it will include carpentry repairs totaling \$1750.00. Then the painting would total \$13,275.00 for the total of \$15,025.00.

This is \$7975.00 cheaper than Chris's bid of \$23,000.00 for what appears to be the same work.

I have watched the progress of the work daily at the Chester Inn, which appears to be good, done by J.Ross.

I don't think this work should begin until we have the grant in hand and good weather begins in the Spring. If J. Ross agrees, I would vote for them to do the job.

I know the work needs to be done, but waiting another 3-4 months is not that urgent. With an old building, I want it done in good weather.

Pat Wolfe

December 9, 2022 – Fred Counts, President

Pat, that is correct. Work would not begin until the matching grant is in hand, but Anne needs a quote approved by the board so she knows how much to ask for. Of course, it behoves us to choose the most competitive bid, and I agree, judging by the work on both structures downtown, we get a lot more bang for our buck by going with J. Ross's bid.

December 9, 2022 – Cari Jarman

Unless there is a concern about the quality of one vs the other, I would agree to go with the lower bid.

Cari

December 9, 2022 – Hal Hunter, Secretary

Fred, Anne,

I am not familiar with the work of either of these two. My initial reaction would be to agree with Pat. However, in reading the quotes, I have several questions. As I read the Bosar quote, an allowance of 2.5K is included for wood repair to cover situations which may not be apparent until work is being performed. If this is an allowance, then I would assume that if the funds are not needed we would have a \$2.5k discount. Also Bosar has included "prime all surfaces" and apply 2 coats of

exterior paint. This would be an additional cost and would increase the labor cost. Ross does not mention any primer.

I would like to better understand exactly what they are stating on these items. Ross mentions nothing about primer.

As to Anne using these as needed for a grant application, I approve.

Regards,

Hal Hunter

December 9, 2022 – Pat Wolfe, Treasurer

I think Fred needs to talk to Ross about the use of the primer before the exterior application before signing a contract.

Again, with an old building, there just may be things hidden that won't show until they start work. Hopefully, this would be minor that the executive committee could approve from cash on hand.

Pat Wolfe

I vote for J. Ross to do the work

December 13, 2022 – Fred Counts, President

Hal brings up a very good point. There are several areas of advanced wood decay across the Duncan House, which Chris Basar has grouped under an allowance of

\$2.5k, and J. Ross has grouped under "Carpentry Repairs" for \$1.7k. An \$800 difference in price.

When I call about whether or not primer is included in the price of paint under the J. Ross bid, I'm going to ask them to better explain the scope of the carpentry part of the quote.

Thank you,

Fred

December 13, 2022 – Hal Hunter, Secretary

Fred,

If we use the Basar quote for the grant application, do we have to spend it all on the project? I know that HA is not loaded with funds, but I believe that we should carefully evaluate and not just go with the low price. Are we getting the best job possible? I know that J. Ross did the work on the Chester Inn, but what were the requirements of that contract and how much oversight was given. As a state contract there were likely very precise requirements spelled out by an architect or other person and changes or additions would have been resolved by change orders.

I am not suggesting that we hire an architect, but I do believe that we need to fully understand where the differences are in the two prices.

Regards,

Hal

December 13, 2022 – Anne Mason, Executive Director

Hal,

I can say that the Chester Inn project did have a contractor, Ned Stacey with Burton Little. There was a lot of oversight with the Chester Inn project and monthly progress report meetings. Of course, that project was larger than paint, as is the Duncan House with all the wood it needs repaired. In the case of the Chester, J Ross did not repair the wood, that was done by another carpenter.

Chris Basar has been overseeing the work at the Eureka which involved both paint and wood repair.

Anne Mason

Heritage Alliance

December 13, 2022 – Hal Hunter, Secretary

Thanks Anne.

I know the Chester project involved HVAC and other work. J. Ross was a subcontractor and the primary. Would Bill Kennedy be willing to be an advisor on this project?

Hal

December 13, 2022 – Fred Counts, President

I'm still waiting to hear back from J. Ross, but I hope to have our questions answered by tomorrow afternoon.

I ran into Terry today, and he thought it would further help us decide who best to contract with if we had references of work both parties have done within the Historic District. Later on this afternoon, I spoke with Dr. Kennedy about such a reference, as he is intimately familiar with work done by both parties. He expressed confidence in the thorough work of Chris Basar and his business, Architectural Restoration & Paint. He specifically mentioned the work done on the Eureka Inn. He also pointed out that work done by J. Ross in the past was, in his experience, spotty. I hope to have a written recommendation from him soon to share with you all.

With a recommendation by Dr. Kennedy for Chris Basar forthcoming, I'm going to ask for a reference from J. Ross once I hear back from them.

I think once we have a better idea of J. Ross's scope of work, we'll have enough information to vote.

Thank you, everyone, and especially Hal, for your thoughtful comments and work.

Fred

December 14, 2022 – Fred Counts, Board President

Board Members,

I'm awaiting written references still, but I did get a better understanding of the price difference for paint+primer in J. Ross' estimate vs. Chris Basar's. I spoke with Jeremy Yates, of J. Ross, this morning. He explained that, typically, their process when repairing and repainting wood siding is to scrape any places where paint is **missing or peeling**, then **only** prime in those areas. Then, the structure is cleaned and painted.

Chris' proposal, as I understand it, based on a conversation I had with him on 11/26, would remove both peeling paint and areas of weak paint, and the entire structure would be primed and painted. This would allow for better adherence and, hopefully, keep the house from peeling for a longer period of time. Basically, we'd pay more now for a more thorough paint job that would, in theory, last longer between touch-ups and repaints.

Insofar as wood repair goes, Chris would remove any rotten wood and replace with new wood, or salvaged wood from the warehouse. J. Ross would do similar, but keep as much of the existing wood as possible, using filler or caulk to patch holes on compromised pieces. This explains J. Ross' lower price in carpentry repairs.

I've asked Mr. Yates to get a written reference over from the Dishner property they worked on recently, because work on the Chester Inn and Main Street Café may represent conflicts of interest

December 14, 2022 – Jack Van Zandt

In reading the J Toss bid, I too notice he excludes primer while he defines it in his definitions.

To me primer is key to reduced maintenance in the future ... and primer used to be able to be tinted to a color similar to the final if we choose. If one primer is better than the other, we should require the best. Likewise with the paint. If it's a few dollars more but is higher rated, let's use the labor to put something on that delays future labor.

I did not find caulk included in the bids but that could be because I am on the road and missed it. We should require caulking all joints in the bid.

I find that the bids all include 2 coats it is just that some have a coat of primer and a coat of paint while the other 2 coats of paint. And it is good to look at the work of these bidders to see what we are getting.

Funding for repairs is a good thing and we should include it and we should know ahead of time what we expect to be corrected. In fact could we use the months until spring to identify those places and have a contractor fix them properly before painting starts.

Finally, as long as this is, I believe in keeping requirements short, and to the point. This is what we expect. We should also define the brand of paints used and what loose paint is.

And finally again we should meet with the top two bidders and clarify their understanding and ours.

Jack

December 15, 2022 – Pat Wolfe, Treasurer

I agree with you.

December 15, 2022 – Hal Hunter, Secretary

Thank you, Jack. These are good points.

HaL

December 15, 2022 – Pat Wolfe, Treasurer

Yes, I agree.

December 16, 2022 – Fred Counts, President

Jack, thank you for your detailed response. I, too, am concerned that the J. Ross bid does not fully address the needs of the Duncan House with regards to primer and wood repair.

I have received a letter of recommendation for J. Ross, but it was Lamons Construction, not from the Methodist Church property like I had requested. I've attached it in the email. Dr. Kennedy will have a recommendation letter for Chris Basar on Monday.

Anne needs to have the DAR matching grant submitted by Friday the 23rd, so we need to have a vote by Thursday. Jack, Hal, if any of you wanted to reach out to

Chris or J. Ross and request a meeting before then, I have no issue with that. I'm swamped at work right now with the holiday crowds in town, so it'd be something another board member would have to spearhead.

December 16, 2022 – Hal Hunter, Secretary

Fred,

Do we not have any contacts with the church? I see no problem with contacting the church and asking for a recommendation. They may not want to reply, but for me that is an answer.

Hal

December 19, 2022 – Fred Counts, President

Hal, I haven't been working with Dr. Kennedy, Gordon, and Zac on that project. I'll send over a number in the morning. I'm still awaiting a recommendation letter for Chris from Dr. K.

December 26, 2022 – Fred Counts, President

Board Members,

Now that we have two additional letters of recommendation (one from J. Ross from their work on a historic property, and another from Dr. Kennedy), I now believe we have enough information to proceed with a vote on work for the Duncan House, should my call for a motion be met with approval.

I encourage you to read both letters of recommendation carefully.

We have two important metrics to weigh here - cost vs. quality of work. J. Ross has submitted a bid that is quite a bit lower than Chris Basar's proposal, and they have supplied letters of recommendation from clients happy with their work. However, their work on structures within the historic district has not always been of the best quality. This can be seen in the differences in scope of work supplied by both J. Ross and Mr. Basar. Chris Basar's higher quote reflects priming and painting the entire building, whereas J. Ross would only prime spots where paint has come free of the wood siding, soffits, trim, etc. Chris is also proposing repair and replacement of rotten wood trim, soffits, and parts of the porch, whereas J. Ross is proposing to patch and caulk wherever possible. Although Mr. Basar's bid is quite a bit higher, board members Hal Hunter, Jack Van Zandt, myself, and the Johnson City architectural firm of Shaw & Shanks (contacted by Hal Hunter) all believe Chris Basar has submitted a scope of work that best preserves the Duncan House and saves us from doing additional costly work in the future.

Our executive director, Anne Mason, will be submitting a matching grant application with the D.A.R. for up to \$15,000. J. Ross' bid is for \$15,025, Chris Basar's is for \$23,000.

With these metrics in mind, I am calling for a motion to accept Chris Basar's bid of \$23,000 for wood repair, priming, and painting of the Duncan House and allow it to be attached to Anne's D.A.R. grant application, with an exception. Should Chris Basar not be able to complete the work as approved, we would solicit another bid from another competing firm and compare with J. Ross's bid, then accept the best proposal at that time.

Quorum will be noted when we have at least 6 replies. The first response will be recorded as the motion, the second response as a second to the motion. **Please**

indicate either a "Yes" or "No" vote with your motion or requested amendment.

Please *reply all* to this email so that all motions/votes are clear and transparent to all board members.

Thank you!

December 27, 2022 – Cari Jarman

I vote yes

December 27, 2022 – Meghan Kieta

I vote yes

December 27, 2022 – Mark Edmonds

Yes.

December 27, 2022 – Terry Counterline, Vice President

Yes!

December 27, 2022 – Dana York

Yes

December 28, 2022 – Fred Counts, President

Motion from accept from Jack Van Zandt, seconded by Cari Jarman. All those have voted in favor of accepting Chris Basar's bid. The motion carries unanimously. This E-Meeting has been closed.

Board members, thank you so much for getting us through what has to be one of the most drawn out E-Meetings ever. The Duncan House has seen quite a bit of deferred maintenance over the years, and it's important these repairs be made before they get really, really costly.

Anne, you may submit the D.A.R. grant application with Chris Basar's number.

Happy New Year! See you next month at the Annual Meeting!

