

DRAFT REPORT

# THE EMERY ESTATE IN WEYMOUTH

*unique public resource/ unique opportunity*

*prepared by*

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CAMBRIDGE ECONOMIC RESEARCH

June 2012



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# INTRODUCTION

The Town of Weymouth has obtained one of the premier properties in the region, the Emery Estate. Located within a built-up suburban region, the property sits atop an impressively large hilltop with views of the Boston skyline and almost no visual connection to the adjacent neighborhood, and it remains intact as a former single-family, farmed estate.

Many are rightly proud of the property's acquisition, but the need now is to quickly identify the desired uses of the site and follow a beneficial financial plan that improves and maintains the property while allowing the public to enjoy this unique opportunity.

This plan was created to provide the Town with guidance in establishing a process for programming uses for the property and finding a balance of capital investment and revenue-generating activities to support the continued, enjoyable public use of the property.

## PROCESS

This plan was created from a process that required involvement of Mayor Susan M. Kay's Emery Estate Advisory Committee through several months of meetings. The Committee discussed ideas and provided responses and direction to the consultant team, while information was being gathered and the plan was being created.

The public had a special opportunity to participate in the process with an open house at the property prior to an open session at the Middle School. During the session, consultants presented the public with an overview of the site and their findings, and then participants were given the chance to present their own ideas for how to use the property. Comments from the participants were positive and helped frame up the level of participation and quality of public use desired for the Emery Estate.

The consultant team that supported the planning effort was made up of planning and economic development firms. The Cecil Group was the lead firm responsible for planning, public process and design, and Cambridge Economic Research provided support and completed the market and financial assessments.

Minutes of the Committee and public meetings are included as Attachment A for reference.

## SUMMARY OF THE PLAN

Through the planning process, the Advisory Committee determined that the Town would like to hold a large number and variety of public events at the property but a financially-strong program of activities is needed to ensure the long-term maintenance of the property as a unique Town resource.

One of the uses found acceptable by the Committee was a farm supported by the community, commonly referred to as Community Supported Agriculture or CSA. This type of farm provides the land for locally-grown produce that is distributed to residents who buy shares in the farm. In addition:

- The produce could be sold to residents in a farmer's market and sold to local restaurants,
- The facility could be used for local educational programs for different age groups and competency levels,
- The farmer could reside on the site and become the caretaker for the property to maintain a presence, and
- Any excess produce could be provided to local service centers.



This use as a CSA also fits with the property's historic use as a multi-product farm. According to people who previously knew the property when it was active for the Emery family, the farm produced a number of crops and housed farm animals. The barn/carriage house and corn crib structures on the south side of the property are reminders of these past uses.

Another use determined by the Committee was an events center. There are different types of social, institutional and corporate events that are able to pay fees for venues. The range of paying events that could be permitted at the site include, in order of expected value:

- Social and family events – weddings, anniversaries, reunions and coming-of-age events
- Corporate events – nonprofits, institutions, company meetings, receptions and small conferences
- Local social events - community-wide dinners and local club events
- Cultural events – talks, music, films and art events

While analyses conducted for this plan suggest these events cannot fully compensate and fund both the capital and operating costs, the indicators are that with the proper management and staffing by a seasoned manager for the events, the operating costs should be covered sufficiently within 3 to 5 years to create a profit – which would be a reason for a qualified events manager to take on the project. This leaves the capital costs for improvement of the property and building as costs borne by the Town unless a use is proposed that requires and pays for rehabilitation of the building.

## PUBLIC USES

Public uses of the site are deeply valued by the community and are a key reason for the Town's acquisition of the estate. Public access must be integrated into all possible iterations of uses for the property. The possible mix of public uses and access covers a broad range such as:

- Passive recreation with nature trails through the property
- Active uses as a community center with multiple social and educational programs and activities for all ages
- Artists' gallery
- History museum
- Remote access from a web cam in the cupola atop the mansion

With the range of possible uses, proper management will be a key to success. Management options for the property are outlined in this plan. The suggested uses for the property are broad and would require staffing and scheduling to manage the public and paying events, and staffing would be required for the separate management of certain uses such as the farm. It is noted that there are legal restrictions applied to ownership and management because the Town used Community Preservation Act funds to acquire the property. This means that the choices for management include the Town, a nonprofit entity or a trust. While all have potential merit, the facility, to be successful, must be managed by trained staff and seasoned managers, either for the paying events or the CSA farm. Consequently, the Town needs to set the stage for a well-managed complex of uses.

To attract the desired seasoned managers and to determine the most valued uses of the property, this plan recommends that a Request for Proposals process be implemented. This will allow the Town to determine and apply the best criteria and to choose from reasonable options for a financially-strong operation to meet the Town goals expressed for the property.



# VISION

## A VISION FOR EMERY ESTATE

The Emery Estate is a unique public resource and a unique opportunity for Weymouth. The whole town will be able to enjoy the values and beauty of the property for years to come. The property will be preserved in most of its original functions as a home, farm and retreat from the suburban environment that surrounds it. Activities, paid and free, will be organized and managed to maximize public enjoyment but also limit the impacts on the neighbors. A high level of professionalism will be applied to manage the property and uses. The fundamental values that kept the property as a complete estate on top of King Oak Hill despite significant change surrounded it will be remembered as the guiding principles for management and enjoyment of the property into the future.

## GOALS

Goals developed through the planning process further frame the values and intentions for the long-term use and enjoyment of the property.

- A primary goal for any use of the property is to preserve the views from within the property, particularly across to the north where the skyline of Boston is juxtaposed against and framed by the pastoral setting of the Estate. The Town will provide remote information on these views, conditions and activities at the property, so people may feel a personal attachment to the estate.
- Because of the public funding used to acquire the estate and the values townspeople apply to the property, another primary goal is to provide spaces for activities that draw the public, including passive and active uses of the Estate. The property will act as a community center, providing activities such as educational courses, after-school programs and exercise programs within a managed schedule.
- The allowed 'paying' uses of the property will be scheduled to provide time for local community events and free social events.
- Supported by its history, the use of the property as a farm suggests that expertise be brought in to re-establish the farm as a CSA venture, supported with an on-site farmer who could also act as property caretaker and a farmer's market. The model for a CSA farm on the Estate could be patterned after the successful City of Newton CSA, which is smaller but comparable in scope.
- The Town, using professional event managers, will not only allow but promote private, revenue-generating events, so sources of funds are received to support the long-term improvement and maintenance of the property.
- Events will be encouraged in the short-term to build interest and awareness of the property.
- In the short- and long-term, building partnerships will be encouraged - especially with local businesses and institutions - to quickly raise capital and provide support for improving the property. This could involve local businesses in events and improvements and student assistance in maintenance and improvements.
- A "Friends of Emery Estate" nonprofit group will be encouraged to provide outreach and support through donations.

While the Town is generally positive about the opportunities that are provided by the Estate, most people also noted issues that have to be addressed in the planning and design of projects so that the impacts of site activities may be acceptable.

- > **Access** – The property fronts on four rights of way - Commercial Street, Emery Lane, James Road and Eden Street. While the current access points into the property are from Commercial Street and Emery Lane, and the main access will be on an improved driveway from Commercial Street. James Road and Eden Street will not be used for vehicular access, but they may be used for pedestrian links if compatible with the on-site trail system.
- > **Parking** – Parking is needed for any of the social or public events held at the site. Off-site parking and shuttles will be considered for use of the Estate. Where additional on-site parking is required to make a desired use feasible, the parking areas must be limited and hidden from the neighbors, building and lawn areas as much as possible and shall be constructed under low impact design standards.
- > **Drainage** – As a hilltop, all runoff from the site drains to the lower properties but should not cause problems for the lower neighbors. Physical changes in the property should include controls on runoff such as the group of design techniques known as Low Impact Development (LID).
- > **Security** – Because of the property lacks direct visibility from the rights of way or the neighbors' properties, securing the site in several ways is needed.
- > **Professional Management** – A dedicated staff of professionals with knowledge of the financial and operational obligations shall be hired to manage the uses of the property.
- > **Restoration** – The landscape shall be restored to retain the longer vistas and quality of the lawns and gardens. The buildings shall be restored in a manner that allows the Town to phase investments in accordance with income from use of the property.

# DESCRIPTION OF THE ASSETS

## THE PROPERTY

The Emery Estate is a parcel of land in the Town of Weymouth with an address of 790 Commercial Street. The parcel is accessed by private drives that connect to both Emery Lane and Commercial Street. Emery Lane is a private way, which is within the boundary and ownership of the property. The 24-acre property sits atop a prominent geological feature called King Oak Hill. On the peak of the hill is a large flat plateau of about 5 acres. This plateau is an open lawn with excellent views to the northwest of downtown Boston. The edges of the site are wooded and slope steeply downward in sections, providing a visual buffer to the abutting single-family residential homes.

The property was settled in the 1900s as a farm and single-family home. The Emery family owned the property from about 1916; the existing home on the site is thought to have been built around 1903. The home was originally constructed for William H. Binnian, Esq. The Town of Weymouth acquired the property from descendents of the Emery family in 2011 for \$1.9 million of Community Preservation Act funds.

The property is nearly rectangular in shape with some variations at its edges. The rectangular parcel is oriented from northwest to southeast. The sloping site is mostly wooded to the north and has an open lawn near its center. The existing structures are located at the south of the open lawn areas of the site. The buildings are accessed on the property by two sloping single-lane driveways, one from Emery Lane and one from Commercial Street. The two driveways connect in front of the main house with a paved turn-around area with a landscaped island. The developed area of the site is relatively limited, and the bulk of the site remains undeveloped open space and woods. The property is served by Town water and sewer with electricity and gas provided by National Grid.

The analysis of the property is presented graphically in the following illustrations. **Figure 1** indicates the existing conditions and the property lines, which include Emery Lane. **Figure 2** illustrates the primary view corridor originating from the main house. **Figure 3** labels the slopes that drop off significantly around the hill as well as the areas of the property and hilltop that could be potential activity areas. Lastly, **Figure 4** suggests the buffers that should be maintained to preserve the quality of the surrounding neighbors. These would also be areas where any encroachments would be rescinded.



**Figure 1:** EXISTING CONDITIONS



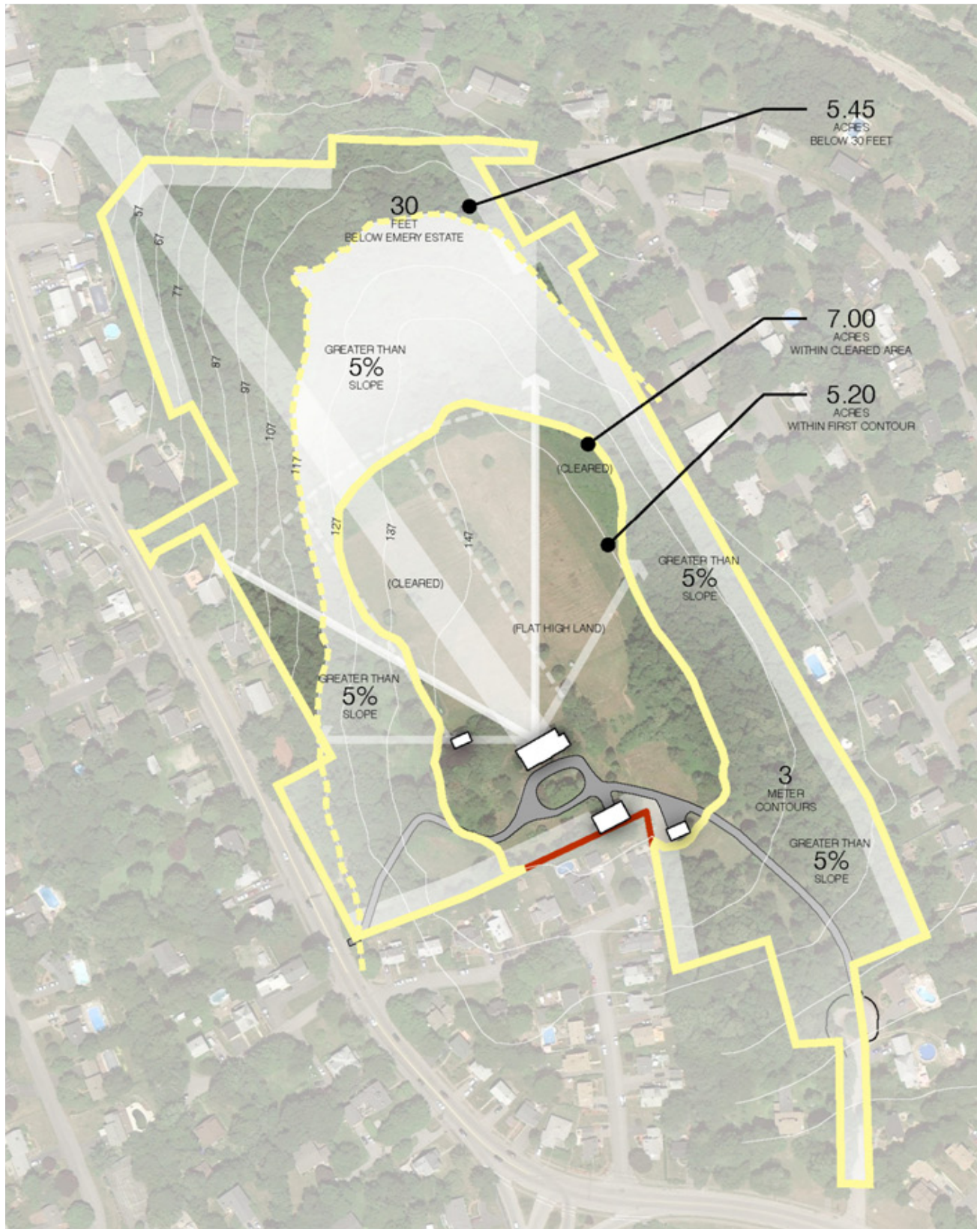


**Figure 2:** VIEW CORRIDOR



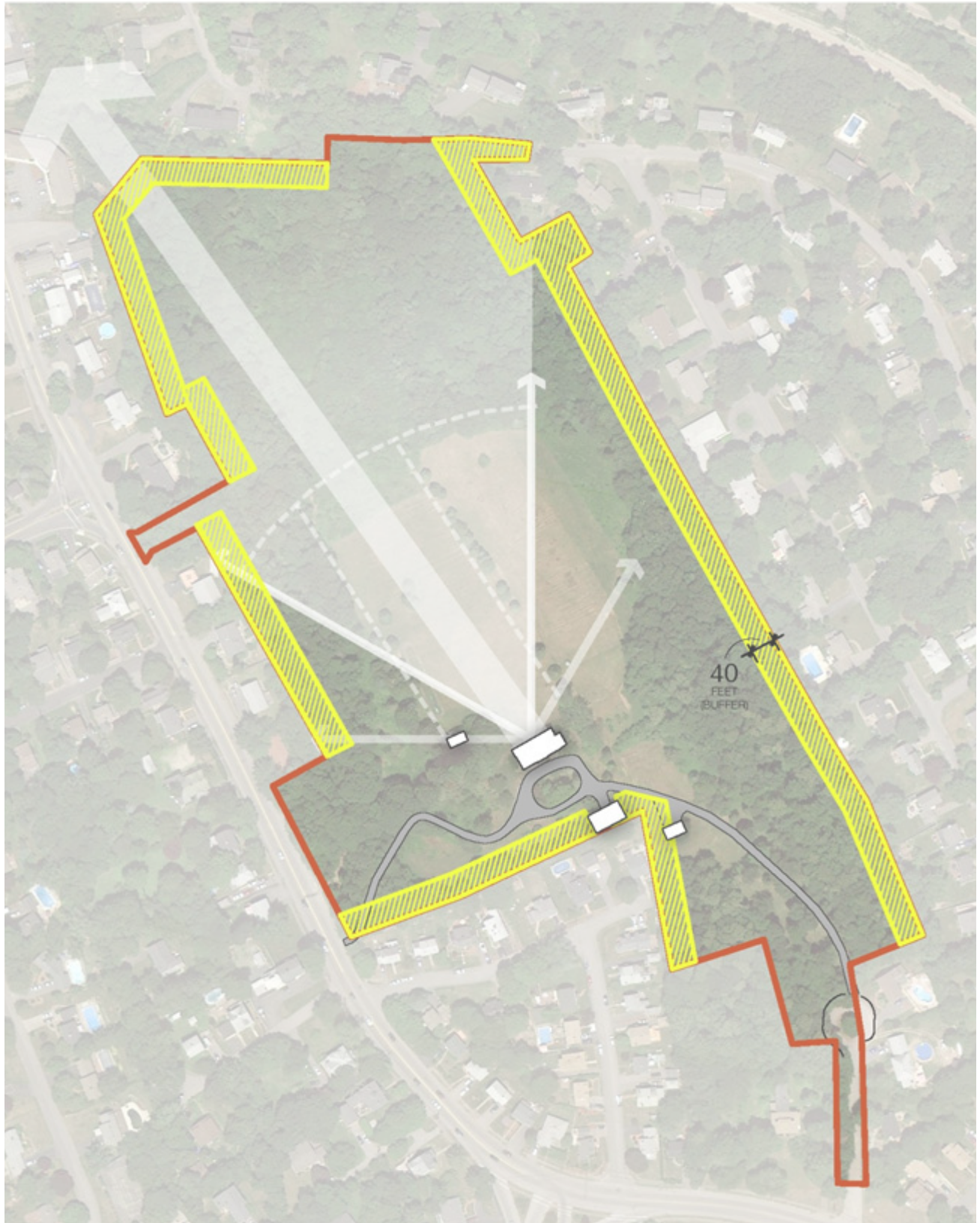


**Figure 3:** TOPOGRAPHY/CLEARED LAND





**Figure 4:** NEIGHBOR BUFFERS



## THE BUILDINGS

The Emery Estate includes several buildings that comprise the built assets of the property. Buildings on the Estate were originally constructed to suit the property's function as a family home and farm. The primary structure is the single-family home, which is the centerpiece of the estate. The parcel also includes a three-car garage, a carriage house and a playhouse. Other smaller structures, a corn crib and a wellhead house, are also found on the site.

### Main Building

The single-family home is a large colonial style house modeled on George Washington's Mount Vernon Estate and designed by Alfred L. Darrow, an architect from Boston. The building is a three-story home with approximately 5,100 square feet of gross floor area, not including the basement [see illustration]. The building is wood-frame construction with wood floor joists and roof framing. The building is in fair condition and is in need of improvements to the exterior finishes to ensure the integrity of the building envelope. The roof shingles have been reported to include asbestos and must be properly removed when replaced. The interior finishes are in need of updating and improvement - the level of which will depend on the final use determined for the building.

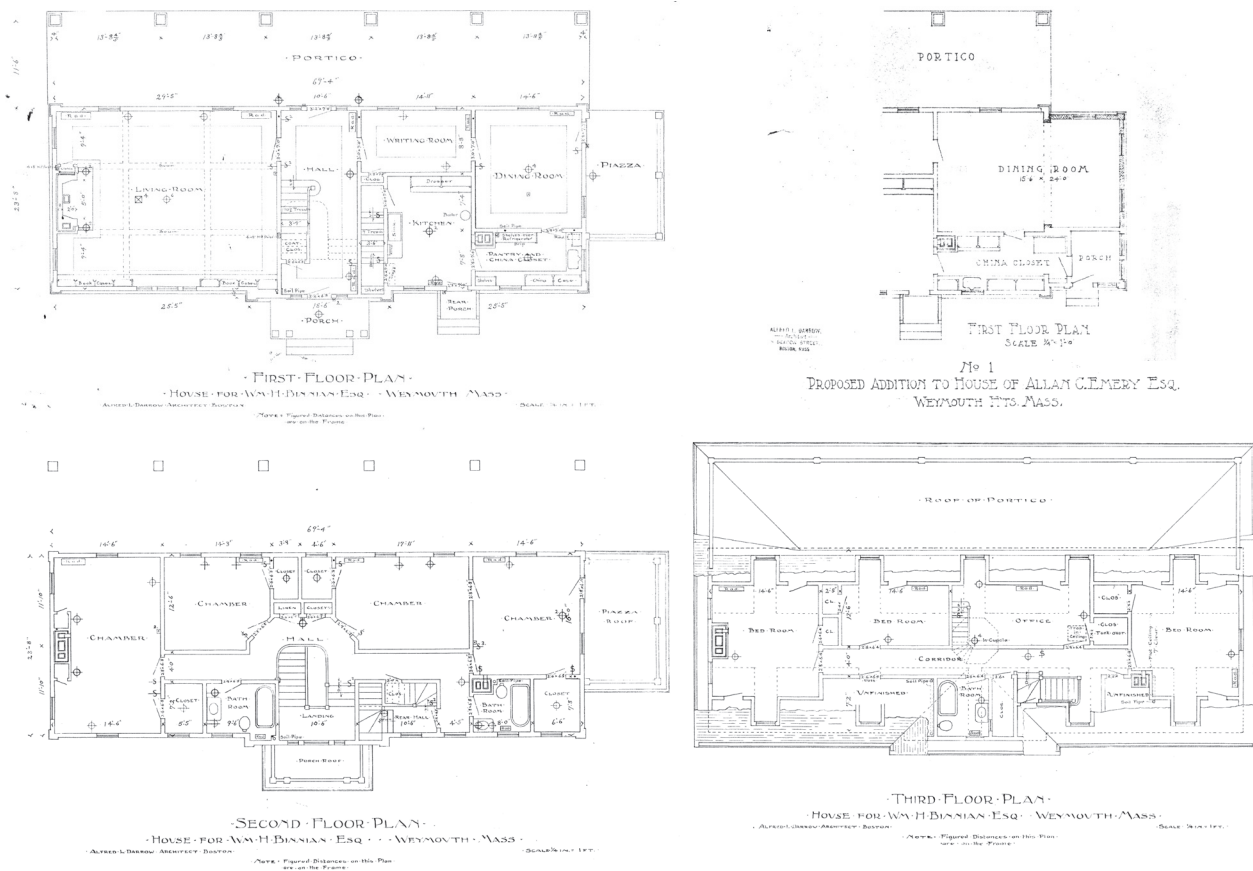
### Building Design Considerations

Designed as a single-family home, the main building will require modifications to be appropriate and safe for other use classifications. The building is not currently sprinklered, and it is assumed that the wood-frame building structure does not have any additional fire-rated protection. Therefore, the first main concern should be to focus on building egress for any building renovation or change of use. Assuming public assembly within the structure, each of the egress doors that lead from the building interior to the exterior should be changed to swing out to the exterior. All of these existing doors currently swing into the building. The existing building provides a total egress width of 138" (the sum of the width of four exit doors), which should be adequate for any new uses based on the estimates of total occupancy possible on the first floor. The existing interior stair width of 45" is also likely to be adequate for egress considerations for new uses on the upper floors.

The second main concern related a change of building use is the toilet fixture count. The home has generous amounts of plumbing fixtures for a residence, but the existing fixtures may not be adequate for other more intensive uses with many more building occupants. Currently, the ground floor has one sink and one toilet; the second floor has two sinks, two toilets and two bath/showers; and the third floor has one sink, one toilet and one bath/shower. Of particular concern would be an assembly use on the ground floor, which could require the addition of three or more toilet fixtures to adequately provide for fixture requirements and the demands of more intense uses.

The third main concern is closely related to both egress and toilet fixture needs; this consideration is accessibility. Currently, the upper floors of the home are accessed only by stairs. If the change of use would place a unique function that must be accessible to the public, then the upper levels would need to be accessible and would likely require the installation of an elevator. An elevator would be a considerable expense. The ground floor is close to accessible as it exists. It has an accessible ramp that leads to the front door, and then the ground floor is all at the same level with no steps or significant changes in elevation. Depending on the new use, an additional accessible path may want to be created off of the rear porch. A new toilet fixture construction to accommodate increased plumbing fixture needs should be designed to provide adequate accessibility to at least one fixture for both sexes.

**Figure 5: HISTORIC BUILDING PLANS**



## Carriage House

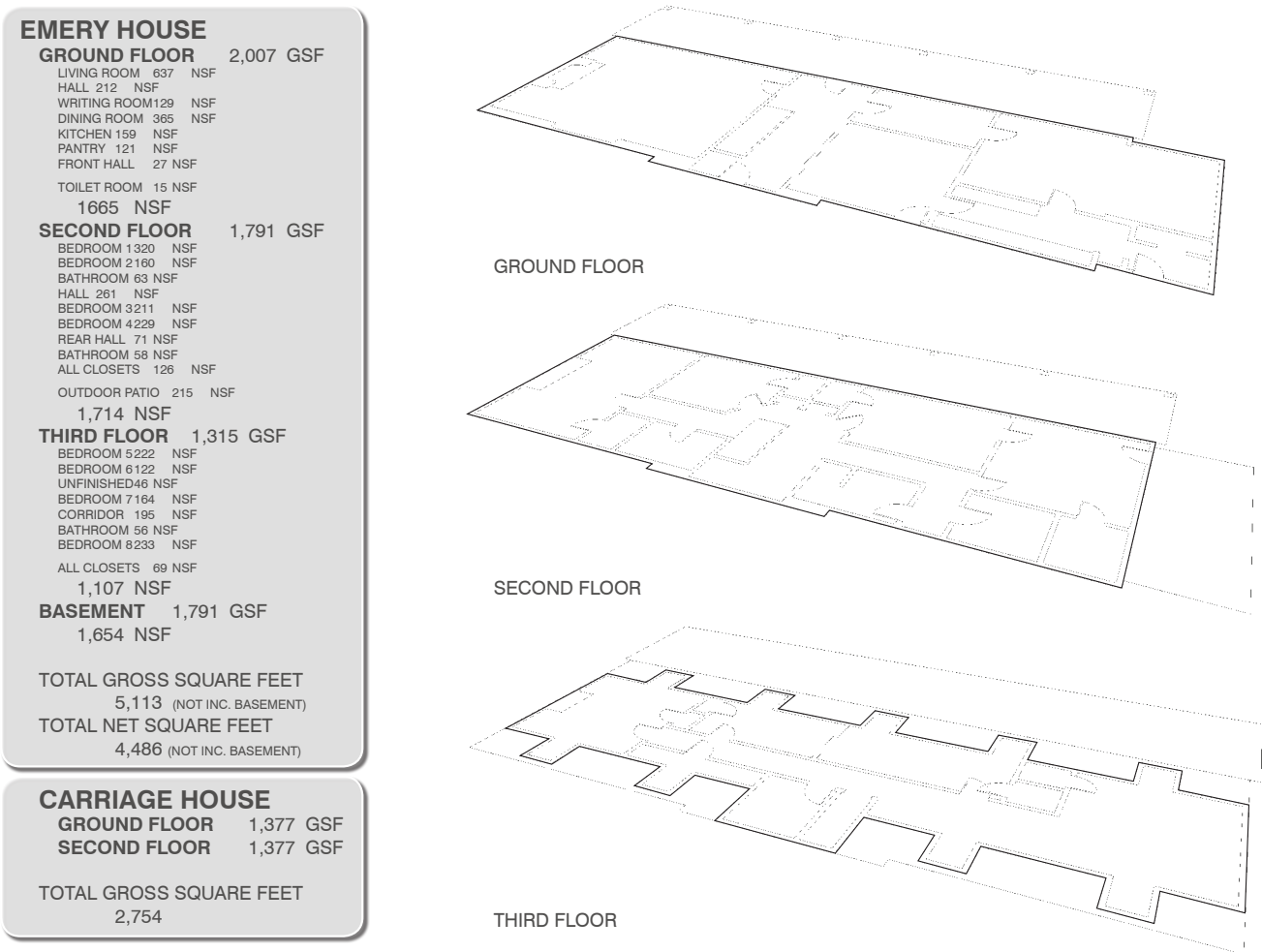
The carriage house is the next largest structure on the property. It is a two-story building with approximately 1,400 square feet of area on each floor, or a total of 2,800 square feet for the building. The carriage house is a wood-framed structure with a minimal exterior building envelope that does not include continuous insulation or interior finish materials like wall board, particularly on the upper floor. The home has one exterior swinging door and a garage door. Depending on new uses, this building may require an additional egress door. The carriage house includes one toilet fixture on the upper floor but no other plumbing fixtures. A new use would likely require renovation to include a single toilet room with a sink. Overall, the structure and building envelope appear to be in fair condition. There was a fire in the building that left some damage, but it was apparently not sufficient enough to cause structural damage.

## Other Structures

The remaining structures on the site are much less significant in scale than these two primary buildings. The three-stall garage is a newer addition to the property relative to the more than 100-year-old home. It is in fair condition and would not likely be considered for any new use or renovation. It would likely remain on site as storage or a parking area. A small single-room children's playhouse exists on the site near the main house. The children's playhouse is in poor condition and appears to be the most damaged structure on the property. For any reuse or renovation considerations, the children's playhouse would require a more substantial building evaluation with structural and architectural review. Other small structures are located on the site and include such small buildings as a corn crib and well head building. These small structures should be maintained and kept in place as a part of the original character of the property until adequate research into the historic significance and function of these structures can be determined.



Figure 6: HISTORIC BUILDING PLANS



VALUES

Beyond the built investments in the property, the substantial value of this site is found in its unique location on the top of a prominent hill with commanding views of downtown Boston. The picturesque view is further enhanced by the scale and orientation of the site and its relative isolation from its surroundings. Several important features of the land were analyzed to better understand the value they bring to the property as well as the potential benefit or constraints that may be associated with these assets of the property, including the views, topography and wooded site.

The primary feature of the site, beyond the buildings and all other amenities or features, is the view to the northwest of the downtown Boston skyline. The orientation of the property almost perfectly aligns the view corridor to the skyline perpendicular to the rear of the house and its back porch. The site then features an open lawn that leads out from the back porch directly toward the view of the skyline; both edges of this lawn are framed by mature trees. At the end of this great lawn, the topography slopes downward to the surrounding context below, allowing the great expansive view from the top of King Hill to be so prominent. The orientation of the site, the buildings and the landscape all reinforce the prominence of this view corridor. Any potential use of the site should consider this view and the preservation of it as a primary consideration in the decision-making process.

The natural topography enables much of the unique value of this property but also limits its potential for reuse. The main plateau of the site is the most usable area, as evidenced by the portions of the site that had been previously cleared for residential use and agriculture. This area also has soils suitable for agricultural use, according to the USDA Natural Resources Conservation Service. The edges of the site become steeply sloping and heavily wooded. Most of the natural topography of the site is at a slope greater than 5%. The upper plateau, a relatively flat highland of about seven acres, provides the most useable area of the site that has been cleared of trees. A lower area to the north of the site provides less steep slopes in a wooded area of about five and a half acres. The slope and landscape buffers provide a unique sense of isolation of the property. The adjacent neighborhood homes are not visible from the site. Any potential use of the site should consider this relative isolation and buffer to the neighbors. A small amount of additional clearing may be appropriate on the plateau portion of the site, but a generous sloping and wooded buffer of not less than 40 feet should be maintained in all circumstances.

## LAND USE AND ACTIVITIES PROGRAM

The Emery Estate Advisory Committee has considered many variables, alternative uses, site considerations and ideas to provide the following list of considerations that should be reflected in any future land use or activities programs that are established for the Emery Estate.

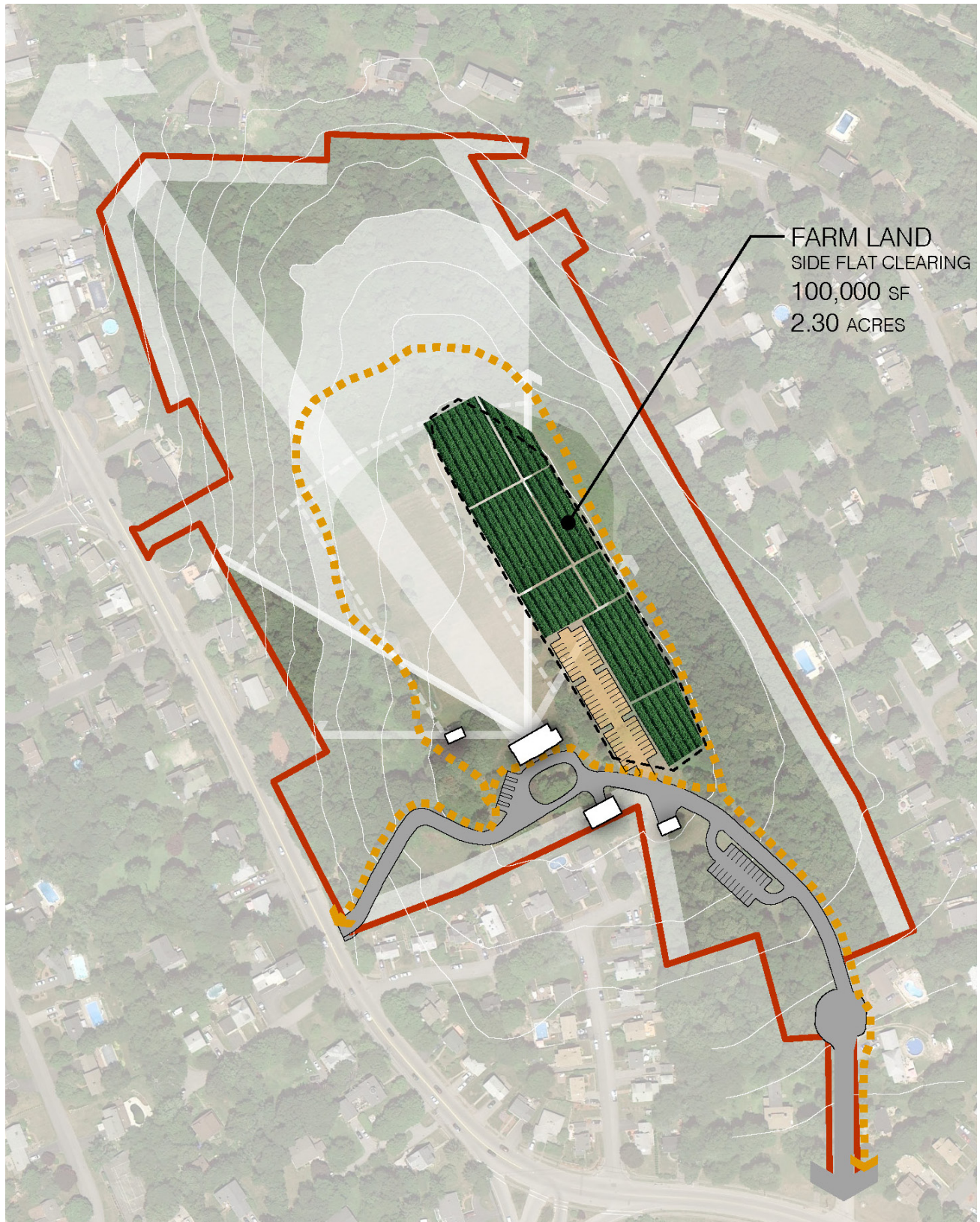
Conceptual Fit Studies were prepared to analyze the options and conditions for the primary revenue-generating uses. The primary studies (the following figures) show an outdoor event center with a tent and a CSA farm as single uses, and one illustration shows the uses combined.

### PREFERRED USES AND CONDITIONS

- **Preserve the view** – As has been discussed, the view to the northwest of Boston is fundamental to the unique and distinct value of this property. Any land use and activity proposal should preserve or enhance this view corridor on the site.
- **Provide public open space** – Open space that draws the public, including passive and active uses, should be used to reinforce the property as an immensely valuable public asset for the people of the Town of Weymouth. Its future uses should provide open opportunities for the public to enjoy this unique property and the benefits of its acquisition by the Town.
- **Allow paid events** – To subsidize the maintenance and operation of public ownership and uses, paid events would provide a regular source of funds that could be dedicated to supporting the improvement and maintenance of the property. While the paid events would provide a necessary source of income for the property, it would also require a balance or coordination with the preference for public uses of the site during times of a private paid event.
- **Establish time for local community and social events** – A coordinated calendar of events at the property would allow the ability to host and promote free social and local community events to further enhance public use of the property. These types of events may include dinners and holiday events or other social Town gatherings or events.
- **Start community supported agriculture** – The site is considered large enough to support multiple uses, and a CSA has been determined to be a desirable use of the land that could be supported by an on-site farmer/caretaker. This use of the land would be consistent with the agricultural history of the property and possibly provide another source of income to support property maintenance and improvements. This type of use could be patterned after the Newton CSA and would include a seasonal farmer's market to support public use of the site.
- **Allow an artists' workshop/gallery** – The collection of buildings and spaces on the site can accommodate several uses at the same time or through coordinated scheduling and management. In the Carriage House, the use of the large open spaces as an artist' workshop or gallery space may be appropriate and would not require substantial renovation or upgrades. This could be organized as a cooperative venture.
- **Provide community center functions** – The main house includes several well-sized and proportioned rooms that may be appropriate for small courses, after-school programs or exercise programs. This type of use would require a schedule that is managed and coordinated with other uses of the building and site, but it should be considered as a way to engage the public and regularly invite them to the site.
- **Provide remote information** – The unique attributes of the site should be a source of pride and identity for the community of Weymouth. This could be reinforced by providing a camera on site that could provide a live-feed of the view or property on the Town's website, so people can feel directly attached to the property even when not able to visit in person.

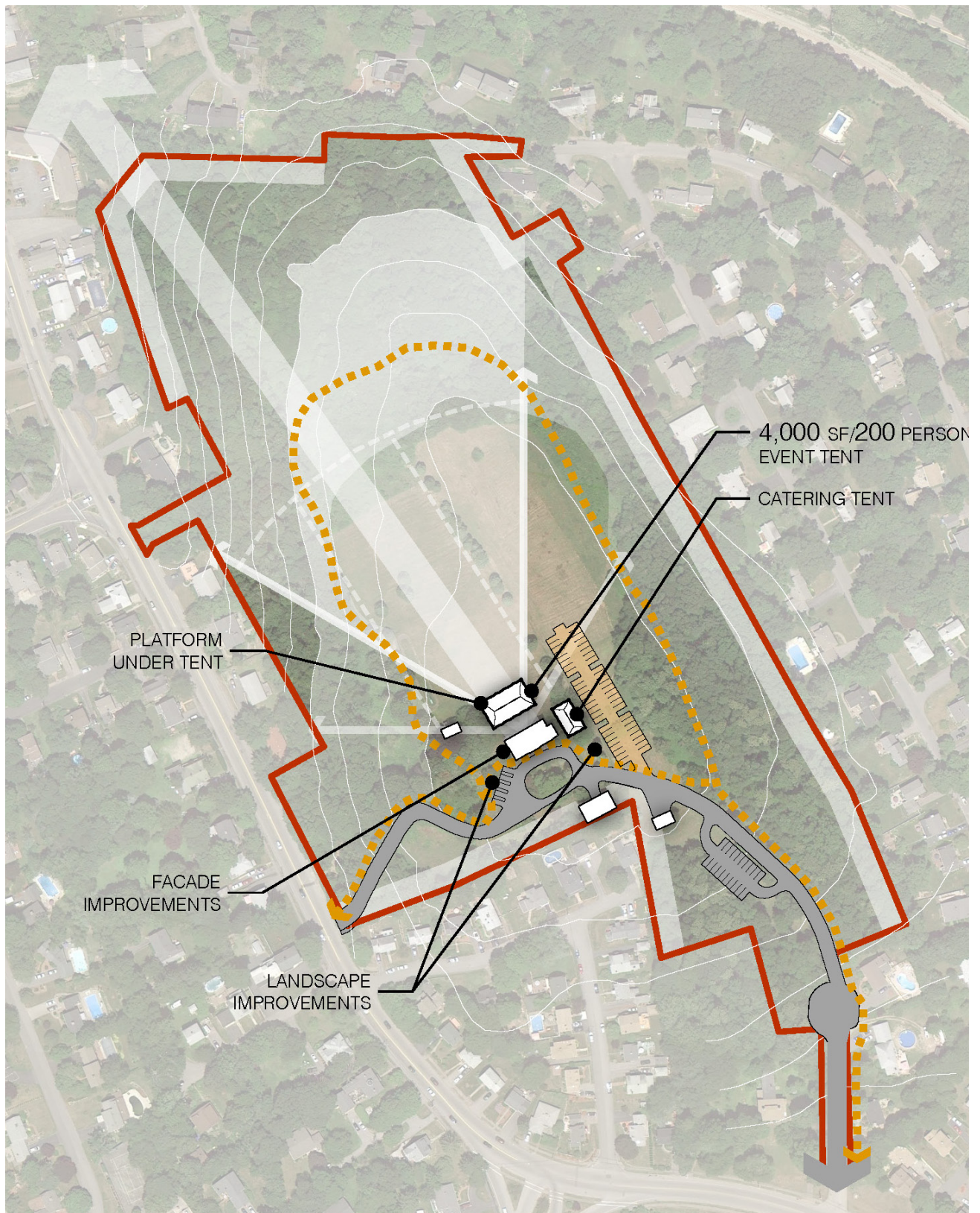


**Figure 7: COMMUNITY FARM**



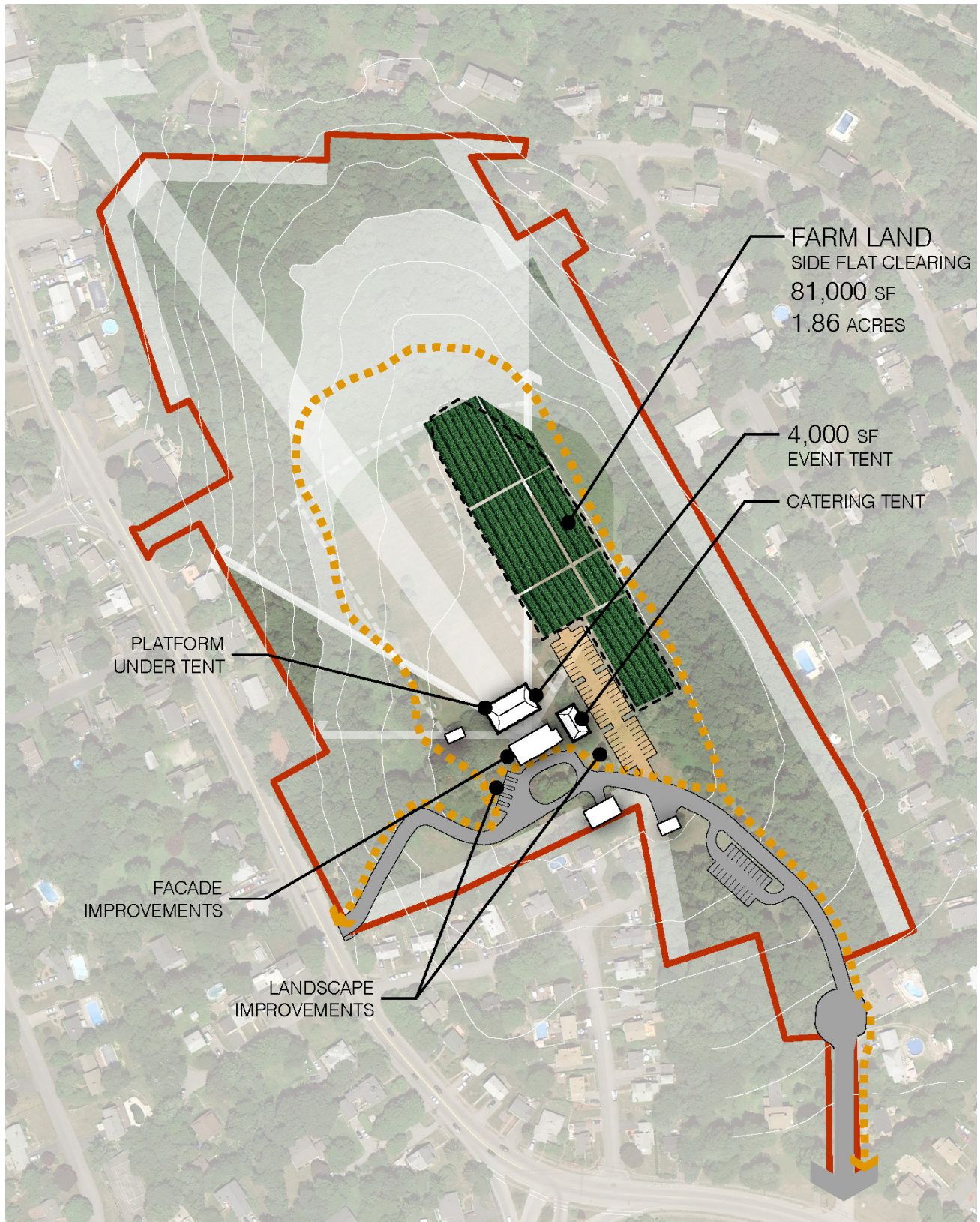


**Figure 8: EVENT TENT**





**Figure 9:** COMBINED SITE USES: EVENT VENUE AND FARM



## FUNCTION AREAS

Historically, the property was divided into areas with functions for access, agriculture, living and play. This plan recommends maintaining these historic functional areas to the maximum extent possible as a way to maintain the historic landscape qualities of the site. As described by the Preferred Uses and Conditions, the ideal use of the property would include multiple uses that could occur in a coordinated manner to best make use of this important Town resource. The areas for access and parking should build off of the existing entry drives. An area for agriculture could be established on the relatively flat and cleared land at the top of the plateau. This area also has soils suitable for agricultural use, according to the USDA Natural Resources Conservation Service. Finally, live and play functions that may be associated with special events or community functions would occur in and around the Main House and the Carriage House. By maintaining these functional areas, it is possible to create a more active and sustained mix of uses - both private and public - that would activate the site and get full use of its amenities throughout more of the day and calendar year. The property is large enough to accommodate many of these functional areas with some additional coordination and management of the events and other uses at the property.

## OPTIONS

A series of options for activities and uses for the property and buildings were suggested for consideration as a method to test the potential of the site and buildings to accommodate multiple uses. One such site test placed a community farm in the eastern clearing on approximately half of the site's cleared plateau. This configuration with improved circulation and parking yields approximately 2.3 acres of agricultural land that could be devoted to community supported agriculture. By comparison, the Newton CSA is approximately 1 acre in size [See Case Studies in the Attachments]. The CSA alone would not necessarily require any improvements to the buildings on site unless one or more were used for the storage of equipment or the caretaker's residence.

Another site test placed an event tent and catering tent on the site to test the feasibility of a private event venue. This fit study includes a 6,000-square-foot event tent set upon a platform that is built into the open lawn behind the Main House's porch. This would be sufficient for a 300-person event. Because the Committee indicated a more modest plan for events, the maximum recommended size is a 4,000 square-foot-tent suitable for 200 people, which would be supported by a 70-vehicle parking area.

The Main House interior could be renovated for use on the ground floor or could be left closed. In either circumstance, the Main House exterior would require façade improvements to provide a scenic backdrop for events. Landscape improvements at the Main House entry would accompany circulation and parking improvements. Additionally, these two functions could be combined for a more full use of the site.



## PHYSICAL IMPROVEMENTS

A number of improvements to the property is necessary to accommodate the options for public and private revenue-generating events, improve access into the property and limit impacts on neighbors.

### BUILDINGS

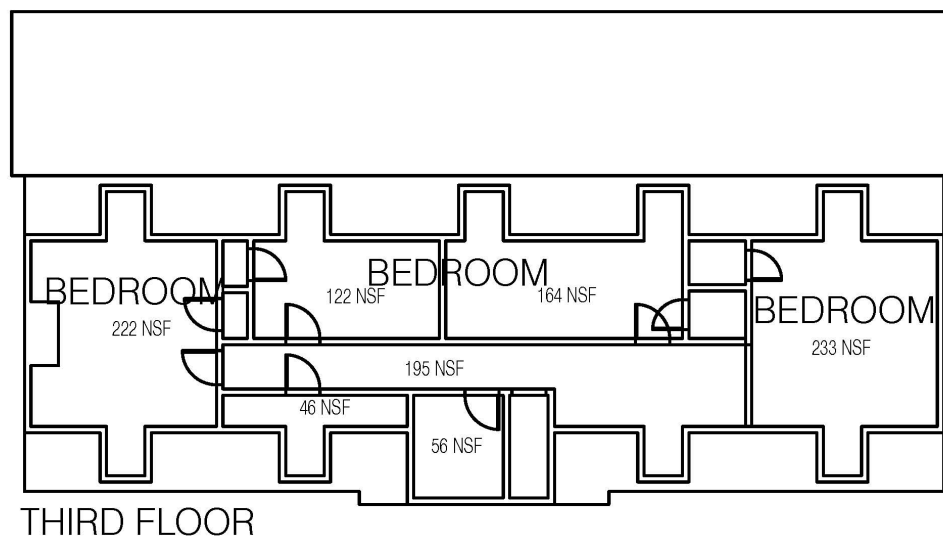
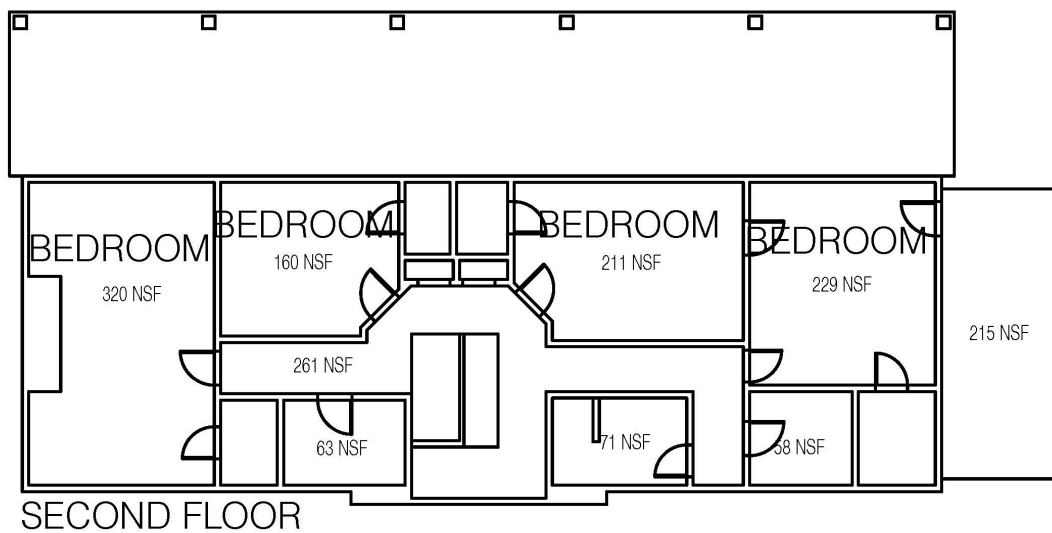
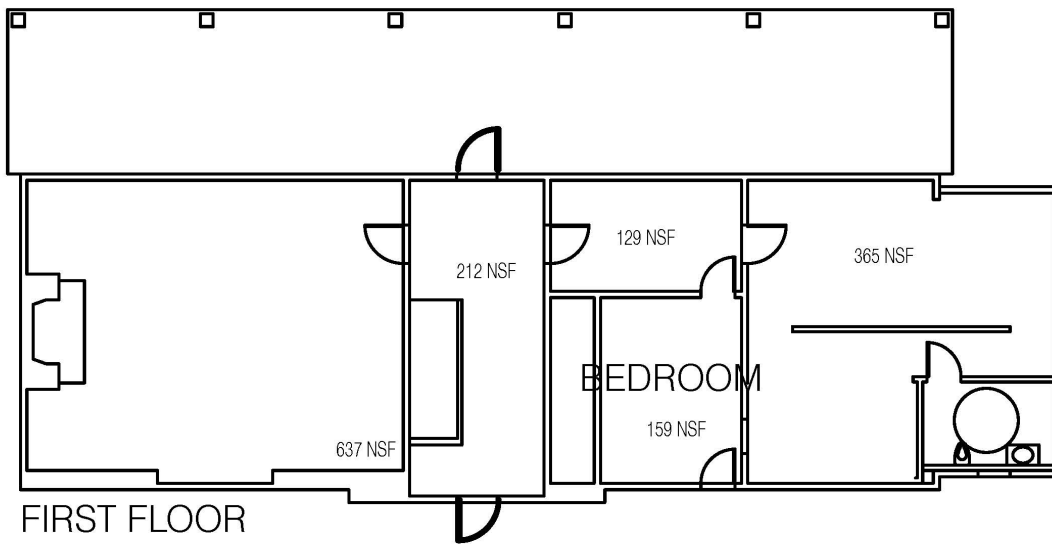
Each of the existing buildings on the property must be assessed and improved for the specific uses that are proposed for the property. These improvements could vary a great deal depending on the intended use of each building and use of the site. In addition to the general discussion of building concerns above, the following specific building needs will likely need to be addressed with any new use.

**Main House** – Prior to renovation for new uses, a needs assessment with an engineering and architectural review should be performed. As discussed in the building description, any new use of the interior of the building would likely require modifications to egress doors, accessibility upgrades and new plumbing fixtures. Utility services for plumbing, heating and electrical may require upgrades depending on needed capacity and intended use. There is a likelihood that the interior paint finishes will need to be de-leaded or encapsulated. Depending on the proposed use, interior renovations and improvements to the kitchen and larger rooms may be required for new functions. The exterior of the building will require a review of and possible improvements to windows, the roof and other important components of the exterior envelope. The existing roof may contain hazardous material, in particular asbestos, and it should be disposed of appropriately. The exterior of the building should be repainted for improved appearance and long-term maintenance.

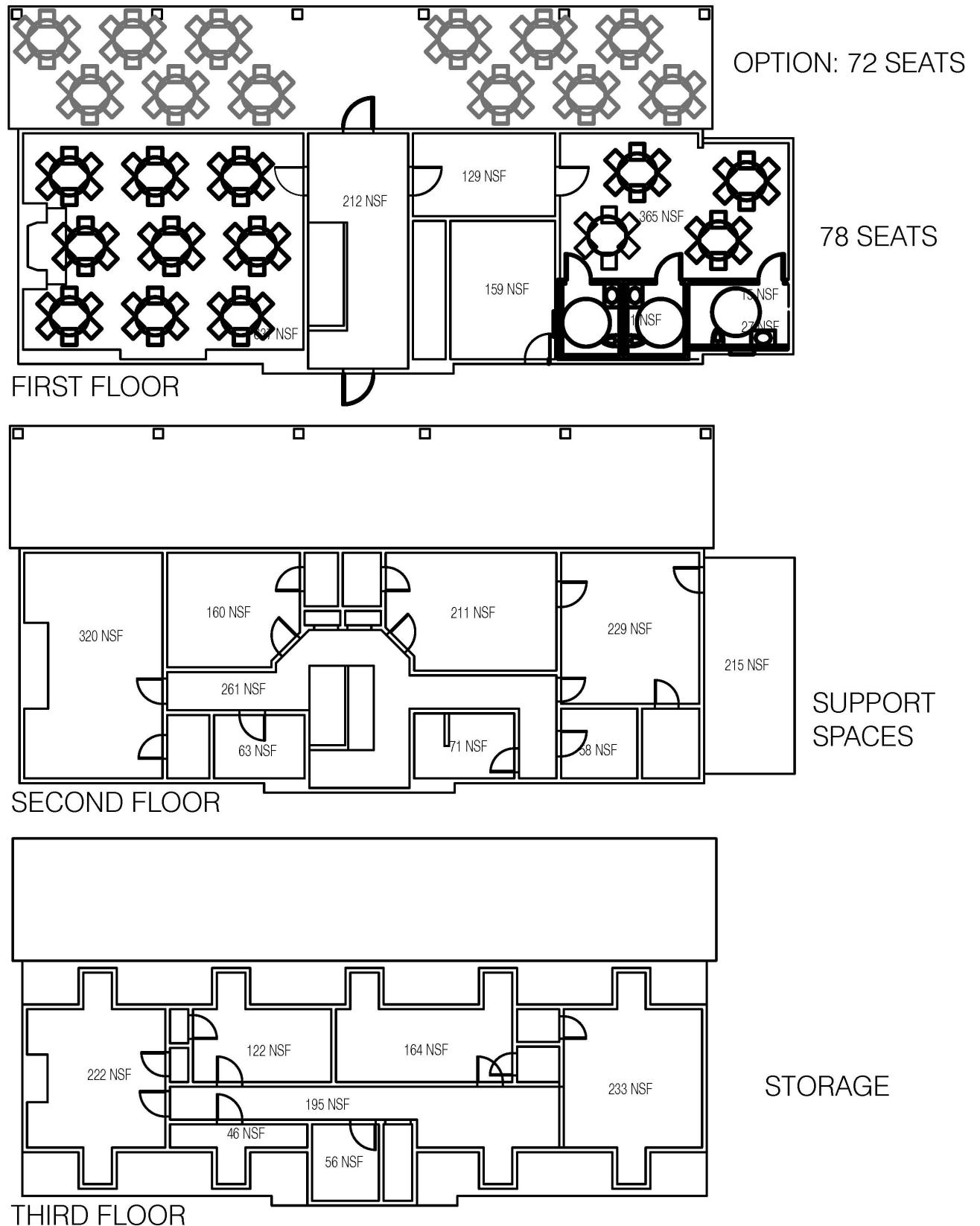
### FIT TESTS

Options for use of the main house are shown in the following illustrations. These were tests to determine what the rooms and layout could accommodate. The Committee considered these prior to making their final recommendations.

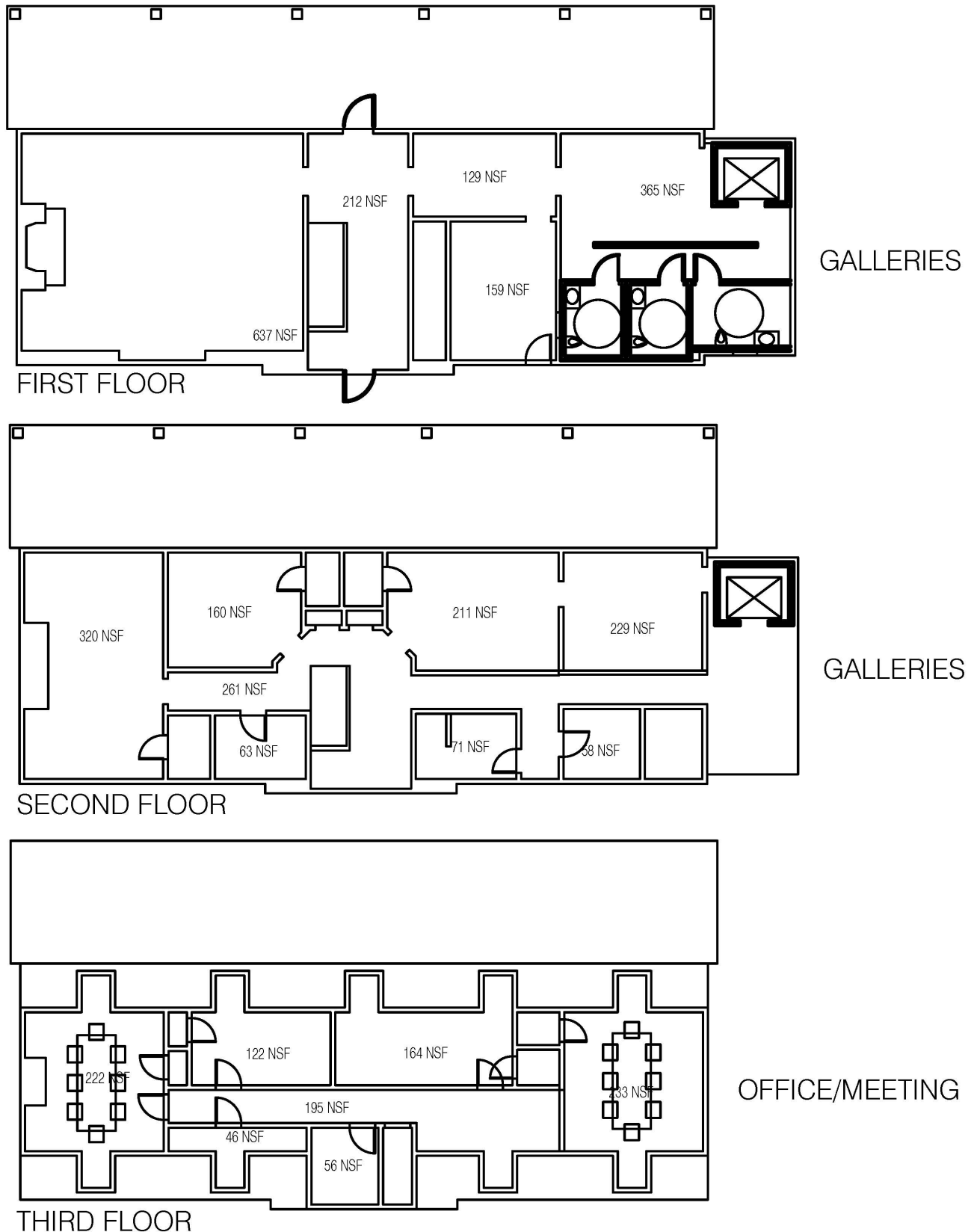
**Figure 10:** BUILDING USE: *BED AND BREAKFAST*



**Figure 11: BUILDING USE: EVENT VENUE**

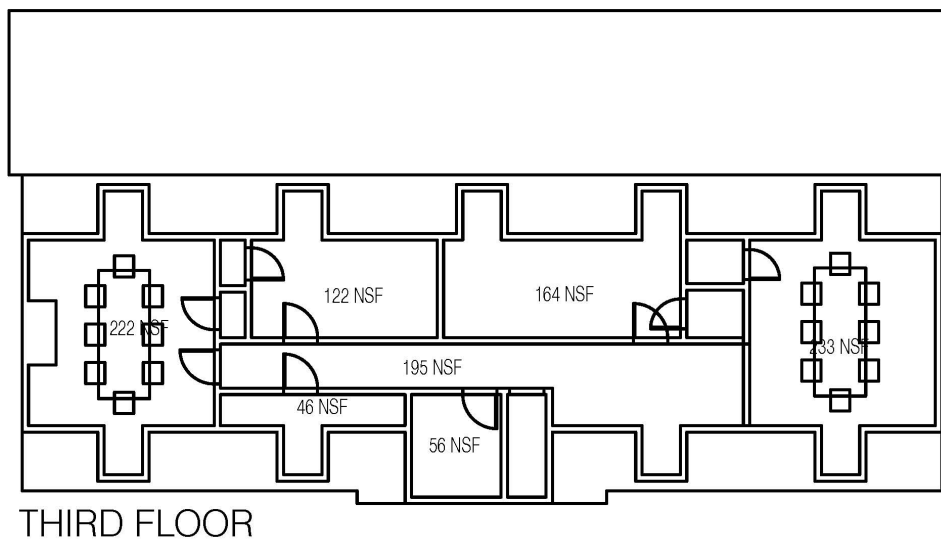
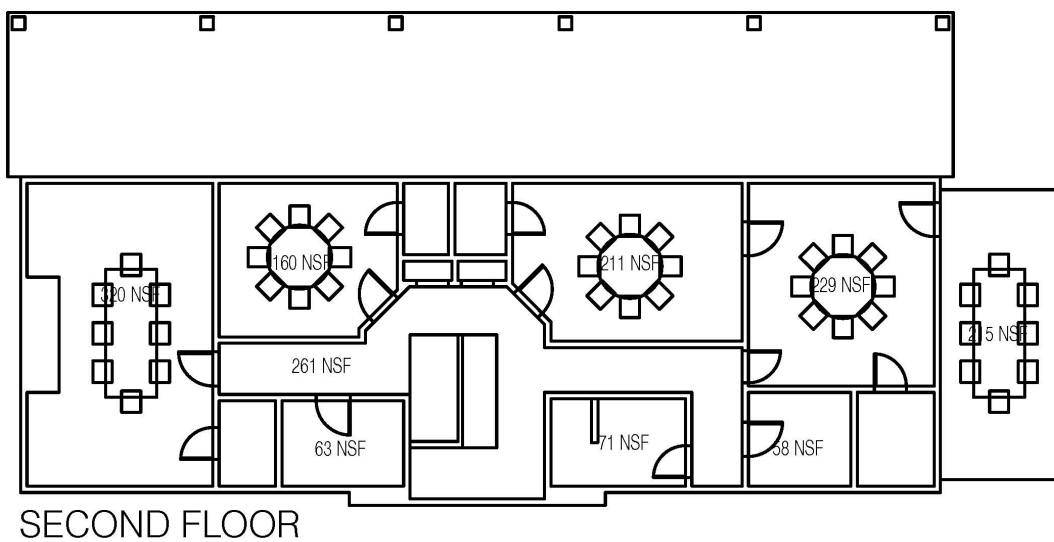
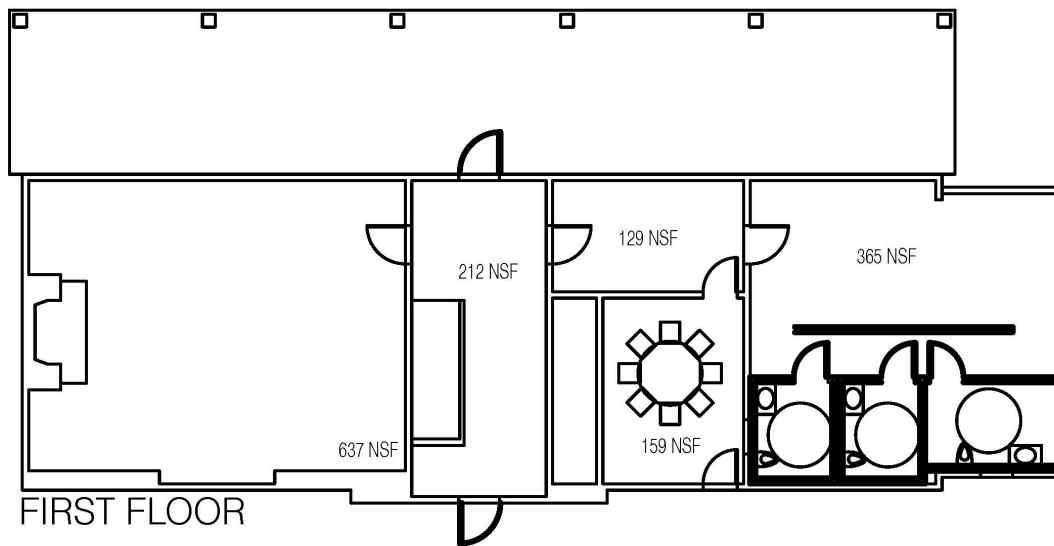


**Figure 12: BUILDING USE: MUSEUM AND GALLERY**





**Figure 13: BUILDING USE: COMMUNITY CENTER**



**Carriage House** – Prior to renovation for new uses, a needs assessment with an engineering and architectural review should be performed. As discussed in the building description, any new use of the interior of the building may require a new egress door. Interior finish improvements could likely be extensive and may require more than paint and general touch-ups. The exterior envelope appears to be in fair condition, but the integrity of the walls, doors, windows and roof should be investigated, and these components should be replaced as needed to ensure a weather-tight structure.

**Children's Playhouse** – Prior to renovation for new uses, a needs assessment with an engineering and architectural review should be performed. The existing condition of the playhouse may indicate that structural repairs are required. Additionally, the playhouse does not appear to be connected to site utilities, including plumbing and sewer connections. These two conditions, the need for structural repair and utilities, may significantly limit the usefulness of this structure for future reuse.

**Garage** – A needs assessment with an engineering and architectural review should also be conducted for the garage. It is not anticipated that the needs of this structure would be substantial if it were to be reused as a garage or storage building.

**Other Structures** – Other small structures on the site, such as corn crib and well head building, should be evaluated for structural integrity. If they are found to be structurally sound and to contribute to the historic narrative of the site, these structures should be preserved as is feasible to contribute to the site's character. These structures should be made to be objects in the landscape and should be secured as to not allow entry.

## ACCESS AND CIRCULATION

Improved parking and vehicular access to the property will be a requirement of any new use of the site. The primary access to the property should be achieved through an improved two-way access roadway that connects to Commercial Street. The existing access located at Emery Lane should be used as emergency vehicle access only. No additional access should be provided to connect to any of the other adjacent roadways or neighborhoods to help isolate any negative impacts associated with more visitors to the site. In regard to parking, exact future needs will have to be determined based on a specific use. However, 75 spaces are indicated as needed to support up to a 200-person event, which is equivalent to a 3:1 ratio.

The pick-up and drop-off area could be reconfigured to include five accessible parking spaces to the west of the Main House. A larger surface parking area could be provided to the east of the site with parking needs that should not exceed 70 permanent paved spaces for visitors or staff. If needed, an additional 50 spaces could be provided in a porous overflow parking lot. This total of 125 spaces should be adequate to serve any of the combination of uses that has been described on the site. The exact design of the parking and site circulation should provide unobtrusive parking that is located down-slope from the site's cleared plateau and outside of the neighbor buffer. All parking, access and circulation improvements on the site will need to be designed with drainage systems appropriate to capture any new runoff created.

## DRAINAGE

One particular concern was voiced repeatedly by abutters and neighbors at public meetings regarding the Emery Estate - drainage. Due to the unique nature of the hill and the surrounding topography, the drainage for downhill neighbors is significant. Any site improvements that occur with a new use of the property should include a focus on site drainage. Runoff water collection and below-ground percolation should be employed to minimize surface water runoff problems that result from the sloping site.

## LANDSCAPE

The unique landscape and wooded edges of the property are important to both the character of the site but also to the character of the surrounding neighborhoods. Any site improvements that cause disturbance of the site should restore the landscape. The overall idea of the site would be to preserve the mature landscape wherever possible and design site improvements such as parking so that they are integrated into the surrounding landscape and blend with the character of the site. The landscape should continue to be an important part of the edges of the site.

## MANAGEMENT OPTIONS

The options for management of the property are limited by legal requirements and deed restrictions. This is important to consider because based on review of other public facilities, the choice of future management will be critical to the success of the multiple programs and uses envisioned. After the overall property management plan is decided, the implementation of the plan for uses and leases is the next step. The recommendation is to ensure a high level of expertise in the ongoing management and implementation.

## LEGAL BASIS FOR USE AND MANAGEMENT

Use and management restrictions apply because public funds - particularly CPA funds - were used for to acquire the property. A copy of the deed and certain relevant excerpts from state law are included in the attachments. While a legal analysis has not been performed, the use of CPA funds for the purchase applies two conditions, according to a reading of MGL Chapter 44B section 12:

- The uses of the property must be restricted to the stated “purpose for which it was acquired,” and
- The management of the property must be the Town, a nonprofit or a trust; the latter two formed in accordance with MGL chapter 180 and 203, respectively.

The deed for the property notes that the Mayor has accepted the property under the Town’s Code of Ordinances, section 2-205, which gives broad discretion on disposition and use of the property. In addition, the Town’s bond was issued under MGL Chap 44 section 7(3), which allows general use and building construction on the property. This would appear to allow any of the uses contemplated in this plan.

The question of what is the most efficient and effective management is therefore the next discussion.

## TOWN MANAGEMENT OPTION

The town management option continues the current situation where the Town is fully responsible for the property. This option allows close oversight on operations and decisions on the allocation of budgets and human resources to the management of the facility. Since the Town could forever be the owner for the property, this ensures the Town’s interests are always best represented. However, this could also place the operation of the Estate in competition with other community projects and needs as Town budgets are determined each year. In addition, the allocation of existing personnel may not fit with the needs of the property management team. For example, the Town does not have an agricultural specialist or a trained event promoter, two positions that would be needed to advance the CSA and social events center, respectively. Consequently, new hires would be needed or changes to existing job descriptions would be necessary to fill these positions.

## NONPROFIT OR TRUST OPTION

A nonprofit or local trust is permitted as a management entity under the state law when using CPA funds. This only requires a vote of the Town Council. If a nonprofit or trust is the desired option, it must be formed and incorporated. While this is not difficult, somebody must decide to proceed with this effort and organize the entity. If this can be accomplished, the entity will be focused solely on the outcomes for the Estate and could hire trained persons and promote the property while maintaining public accessibility. With more flexibility, this option for management has been shown in a number of other instances to be a very efficient and cost-effective means of managing multi-purpose community property resources. See the attached Case Studies for summaries of other facility operations and management. Vendors are also comfortable dealing with people trained in the promotion and management of venues where they may be bidding for work.



## OTHER MANAGEMENT OPTIONS

**Leases and Vendors** – All of the management requirements for the proposed program of uses does not have to be handled solely by the Town or nonprofit entity. It is anticipated that leases will be issued and vendors will be hired for the fee-generating uses and events.

**Property Curator** – One option is to consider the opportunity for a property curator to live on the property and perform some maintenance on the buildings and grounds. The State's Historic Curator Program has used this model to maintain state historic properties [see <http://www.mass.gov/dcr/stewardship/curator/index.htm>]. The caretaker would presumably not be responsible for major renovations but would keep up with some general cleanup of the building and grounds. A clearinghouse for similar property offerings can be found at <http://www.caretaker.org/>, the Caretaker Gazette.

## FINANCIAL PROJECTIONS

Financial projections for the development of the two recommended uses – a 2.8 acre CSA Farm and an Events Center – are presented in this section. These are based on extensive research on the trends in the reuse of historic estate properties in the Boston metro area. Our projections are underpinned by detailed case studies that have examined market segments, marketing strategies, organizational structures and financial performance of numerous comparable CSA farms and Event Centers.

## BUSINESS PLAN FOR A CSA FARM

The first analysis is of the CSA farm operation. There was a high level of interest in this option since the property was used for farming and has elements remaining such as the Carriage House, corn crib and on-site well.

### Demographic and Economic Trends in the Market Area

The market catchment area for the CSA farm is the town of Weymouth. It is estimated that 90% of CSA members will reside in the community, with the remainder drawn from the surrounding towns.

The demographic data presented in Table 1 underscores the robust health of its population base and economy. It shows that, during the past decade, Weymouth has lost a small amount of population. With a decrease of just 386 residents between 2000 and 2009, the loss was less than 1% of the total 53,600 population. Population loss was largely the result of a decrease in household sizes, which also contracted by -1% during this period, reflecting the aging population. The median age increased from 38 to 41 years and is significantly above the national average age of 37 years.

The median household income, at \$66,280, is nearly 30% above the national median (\$51,425) and exceeds the state average (\$64,500). Reflecting the aging affluent population, owner occupancy increased, while rental-occupied units decreased. The total number of housing units increased by 4%. Vacancy doubled from 2000 to 2009 but is still relatively low at 4%, compared with the national average residential vacancy rate of 9%.

Despite its aging population, a high proportion of Weymouth's labor force is economically active – 71%, compared with the 65% national average. The resident workforce is well educated. By 2009, 93% of residents were high school graduates, and 30% were college graduates, compared with 85% and 28% nationally. The poverty rate has increased by 50% since 2000 - from 2% to 4% - but is still less than half of the national average of 10%.

The median housing value nearly doubled from \$183,000 in 2000 to \$256,000 currently. In addition, 92% of the population identify themselves as white, down from 95% in 2000. The proportions of Blacks and Latinos grew, but the numbers are small.

**Table 1: SOCIO-ECONOMIC TREND ANALYSIS - TOWN OF WEYMOUTH  
2000-2009**

<i>General Characteristics</i>	2000	2009	US Average	% Change Weymouth 2000-2009
Population	53,988	53602	-	-1%
Median Age	38.4	41.3	37	8%
Household Size	2.42	2.4	2.6	-1%
Housing Units	22573	23481	-	4%
Owner-Occupied	67%	69%	67%	3%
Renter Occupied	33%	31%	33%	-6%
Vacancy	2%	4%	9%	100%
<i><u>Social Characteristics</u></i>				
High School Graduate	91%	93%	85%	2%
Bachelor's Degree	26%	30%	28%	15%
Foreign Born	5%	9%	12%	67%
Speak Foreign Language at home	6%	10%	20%	67%
% White	95%	92%	75%	-3%
% Black	1%	3%	12%	200%
% Latino	1%	2%	15%	100%
<i><u>Economic Characteristics</u></i>				
In Labor Force	69%	71%	65%	3%
Avg. Commute (mins.)	31	30	26	-3%
Median Hhld Income	\$ 51,655	\$ 66,280	\$ 51,425	28%
Per Capita Income	\$ 24,976	\$ 34,040	\$ 27,041	36%
Below Poverty	4%	6%	10%	46%
Median Housing Value	\$ 182,700	\$ 346,700	\$ 185,400	90%

Source: U.S. Census Bureau

#### Economic Structure

Table 2 shows changes in employment and sales of businesses located in Weymouth. Between 2002 and 2007, the number of jobs in the town grew by 21% - an increase of 2,623 jobs. Wages grew by 34%, and sales of Weymouth businesses increased by 20% during this five-year period.

Large job gains were registered in healthcare, which added 1,259 new jobs; in waste management and remediation, with a gain of 620 jobs; and in retail sectors, which gained almost 400 new jobs. By contrast, manufacturing continued its long-term trend of job losses with the loss of more than 300 jobs. Meanwhile, sales of manufacturing firms based in Weymouth actually increased from \$127 million to \$132 million.

The largest gains in sales were registered in the healthcare sector; billings by medical institutions and offices in Weymouth mushroomed by more than 60% between 2002 and 2007 – nearly \$250 million. Although only 59 new jobs were gained in hotels and restaurants, sales of establishments in this sector grew by \$12 million during the five-year period. In waste management firms, employment growth (89%) far outstripped that of sales (24%) due to the growth of labor-intensive recycling processes.

**Table 2: EMPLOYMENT, WAGES AND BUSINESS SALES IN WEYMOUTH**

	2002			2007			<u>% Change 2002-2007</u>		
	<u>Jobs</u>	<u>Avg. Wage(\$)</u>	<u>Sales (\$1000's)</u>	<u>Jobs</u>	<u>Avg. Wage (\$)</u>	<u>Sales (\$1000)</u>	<u>Jobs</u>	<u>Wages</u>	<u>Sales</u>
Health care & social assistance	5,388	37,735	407,875	6,647	44,004	656,701	<a href="#">23%</a>	<a href="#">17%</a>	<a href="#">61%</a>
Retail trade	2,571	26,410	663,233	2,967	27,674	759,386	<a href="#">15%</a>	<a href="#">5%</a>	<a href="#">14%</a>
Waste Mgt. & Rem.	695	31,492	66,500	1,315	27,262	82,520	<a href="#">89%</a>	<a href="#">-13%</a>	<a href="#">24%</a>
Hotels & Restaurants	1,195	12,189	49,806	1,252	13,256	61,881	<a href="#">5%</a>	<a href="#">9%</a>	<a href="#">24%</a>
Professional Services	NA	-	-	937	58,020	144,185	<a href="#">NA</a>	<a href="#">NA</a>	<a href="#">NA</a>
Other services	756	22,933	61,516	789	23,373	57,286	<a href="#">4%</a>	<a href="#">2%</a>	<a href="#">-7%</a>
Manufacturing	934	36,424	126,832	628	43,844	132,378	<a href="#">-33%</a>	<a href="#">20%</a>	<a href="#">4%</a>
Real Estate	226	31,788	31,535	205	40,766	34,434	<a href="#">-9%</a>	<a href="#">28%</a>	<a href="#">9%</a>
Information	158	36,823	N	145	63,221	N	<a href="#">-8%</a>	<a href="#">72%</a>	<a href="#">NA</a>
Wholesale trade	<a href="#">339</a>	<a href="#">46,678</a>	<a href="#">202,597</a>	<a href="#">NA</a>	<a href="#">NA</a>	<a href="#">NA</a>	<a href="#">NA</a>	<a href="#">NA</a>	<a href="#">NA</a>
<b>Total Jobs</b>	<b>12,262</b>	<b>28,247</b>	<b>1,609,894</b>	<b>14,885</b>	<b>37,936</b>	<b>1,928,771</b>	<a href="#">21%</a>	<a href="#">34%</a>	<a href="#">20%</a>

Source: US Census Bureau,  
Economic Census.

The highest wages were paid to workers in information (\$63,200), professional services (\$58,000), health care (\$44,000) and manufacturing (\$44,000). The lowest paid workers are employed by hotels and restaurants (\$13,000), non-professional services (\$23,000) and retailing (\$28,000).

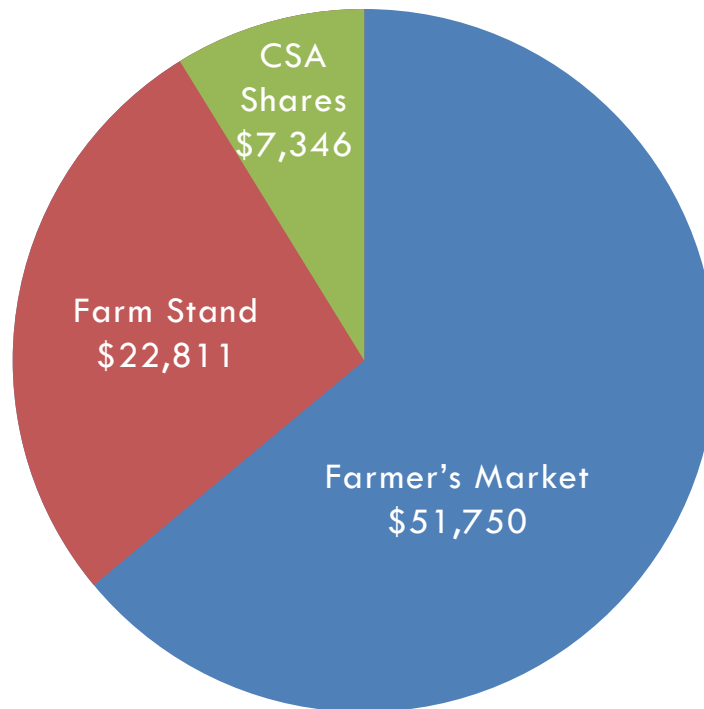
#### Market Segments

Based on Newton's CSA, it is estimated that 2.8 acres can support about 90 shares. Nearly 60% of farm revenues are expected to be derived from CSA shares, with an additional 25% from farm stand sales. The remaining 15% is expected to come from farmer's market and restaurant sales.

The chart below shows the contribution of these revenues to the total \$88,426 in farm income that is estimated for Year 3, the first full-year of operations after the initial ramp-up period. The projections are based on a 90-share CSA farm.



**Figure 14:** PROJECTED REVENUES FOR A 2.8 ACRE CSA FARM AT EMERY



#### Staffing

By Year 3, the farm should have three staff members - a farmer, an apprentice farmer and a part-time education coordinator. Based on salaries paid by Newton's CSA, the total annual salary expenses for these three positions and several hourly support positions for farm and administrative help are estimated at around \$70,000 as is detailed below:

**Table 3:** PAYROLL EXPENSES FOR AN 88-SHARE CSA FARM

Event Coordinator	\$2,150
Education Coordinator	\$12,645
Farmer (Fulltime)	\$33,075
Apprentice Farmer (Fulltime)	\$14,025
Farmer's Market	\$630
Workshare	\$570
Office Staff	\$1,367
Payroll Taxes	<u>\$4,889</u>
<b>Total Payroll Expenses</b>	<b>\$ 69,361</b>

*Source: Newton Community Farm, 2012 Business Plan*

These estimates assume that the farmer is given on-site housing as part of the compensation package, either in part of the house or in the carriage house.

## CSA Board Support

In order to leave the farmer time to manage farm operations, the board needs to assume responsibility for oversight of administration, finance, communications, fundraising, educational programs and physical improvements. Board members should have the following committees:

- **Education Committee** – Work with the Educational Director to design appropriate classes for all age groups in the community
- **Events and Outreach Committee** – Help plan and oversee major seasonal events designed to foster community involvement in the farm
- **Preservation & Buildings Committee** – Supervise maintenance and improvements to structures on the property
- **Communications Committee** – Provide strategic oversight in scheduling press releases and development of web content, posts, blogs and tweets
- **Fundraising Committee** – Plan fund drives and fundraising events

## Membership

By Year 3, it is estimated that a 2.8-acre CSA could support 90 full shares. Many of the full-share equivalents will be comprised of half shares. Newton's CSA, for example, sells twice as many half shares as it does full shares. Shares should include some pick-your-own crops such as peas, beans, cherry tomatoes and herbs. Share sizes vary throughout the season.

CSA pick-ups can take place at the farm two afternoons a week. Members should be required to work on the farm a certain number of hours every week. At the Newton CSA farm, they can opt out of the 12-hour work requirement per season by paying an additional \$108 a season.

## Share Pricing

The CSA determines share prices according to what the market can bear. The market value for full CSA shares in Eastern Massachusetts is \$550 to \$650 a season. Newton's share price is \$575. Weir Farm in Hingham charges \$625 for its shares. In making up shares, the farmers consider the market value of the produce they are providing. A \$575 21-week share works out to be about \$28 a week.

Early in the season, shares will be less valuable and lighter, being comprised mostly of greens. Later in the summer when vegetables are available, shares are heavier and more valuable. Farmers check prices for the same items at Whole Foods and farmer's markets to determine the appropriate volume of produce that goes into each share. Most CSA farms try to give shareholders about 10% more than market value, depending on the growing season.

Based on prices in the Boston metro area, the recommendation is to sell full shares for \$575 and half shares for \$300.

## Education

The farm should provide the community with an authentic farm experience and an opportunity to learn sustainable growing methods. As a fully operating and working farm, it is an ideal platform for teaching the entire food chain, from pre-seed to post-harvest to food processing and preservation.

A part-time Education Coordinator should be employed to run the education program. Their job would be to recruit teachers who would help to recruit students in return for a percentage of the revenues from class fees. Classes can encompass the full spectrum of food production, including soils, plants, shrubs, trees, composting, cooking and food processing.

Programs for all ages and skill levels should be offered, including:

- **Classes and workshops** – Hands-on training in sustainable growing and food preparation skills for all age groups
- **Summer programming** – Farming training for elementary and middle school students
- **Story-times and activities for pre-schoolers**
- **School outreach** – Bringing the farm to schools with talks and projects

#### Fundraising Events

Public events showcasing the farm foster community involvement and are an important vehicle for fundraising. Fundraising events raised \$36,000 for Newton CSA Farm last year.

Events could include the following:

- **Seedling sales** – Newton's CSA raised over \$15,000 last year from selling seedlings
- **Socials featuring farm produce**
- **Evenings on the farm** – Food, music and conversation on a summer evening
- **Fall festival** – The fall festival at Newton's CSA brings nearly 1000 people to the farm
- **Informal dinners featuring farm produce**
- **Halloween parties**

#### Financial Projections

As is shown in Table 4, total farm income from all sources is estimated at \$116,425 by Year 3. Three-quarters of total revenues are expected to be from farm operations, with the remainder coming from education programs, events and sales. Expenses are projected to total \$127,700, leaving a fundraising requirement estimated at around \$11,300 for Year 3. Newton's CSA raises 27% of its annual revenues each year. Last year, this totaled more than \$40,000 for the Newton farm, so roughly \$12,000 is a very reasonable goal for an Emery Estate CSA.

**Table 4: OPERATING BUDGET - CSA FARM YEAR 3 OF OPERATION**

**Income**

**Farm Operations**

90 Full CSA shares @\$575	\$	51,750
Farm Stand	\$	28,225
Farmer's Market	\$	7,525
Restaurant Sales	\$	6,580
<b>Total Farm Operations Income</b>	<b>\$</b>	<b>94,080</b>

**Non-Farm Income**

Education Programs	\$	8,000
Events & Sales	\$	20,000
<b>Total Non-Farm Income</b>	<b>\$</b>	<b>28,000</b>

<b>Total Income</b>	<b>\$</b>	<b>122,080</b>
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**Expenses\***

Farm Operating Costs	\$	24,097
Grounds Maintenance	\$	5,000
Utilities	\$	6,046
Education Programs	\$	1,550
Events	\$	2,000
Administration	\$	5,000
Social Media Development	\$	5,000
Payroll*	\$	70,000
<b>Total Expenses</b>	<b>\$</b>	<b>118,693</b>

<b>Net Operating Income</b>	<b>\$</b>	<b>3,387</b>
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**\* Assumes that the Farmer lives on site in part of the house or in the carriage house.**

**Grounds & Buildings Maintenance are included in the Events Center budget.**

*Sources: Newton Community Farm, 2012 Business Plan & Case Studies presented in Henderson, Sharing the Harvest, 2010.*

The revenues could be improved with income from social events. The following table includes revenues and costs associated with that combination of uses.



**Table 5: OPERATING BUDGET - EVENTS CENTER AND CSA FARM**

<u>Revenues</u>	
24 events p.a. @ \$700	\$16,800 2 events per summer weekend
8 events @ \$250	\$2,000 1 event per off peak week shoulder se
Fundraising Events	\$10,000 Four fundraisers@ \$2500
Farm	\$3,400
Total Revenues	<b>\$ 32,200</b>
<u>Expenses</u>	
Part-Time Site Coordinator	\$25,000
Building Maintenance	\$7,000 \$1.66 /sf based on Highfield Hall
Grounds and Trails Maintenance	\$15,000 \$2480 an acre * 8 acres
Utilities	\$6,000 \$1.42 sf based on Highfield Hall
Insurance	\$7,500
Farm	\$0 Farm is self-sufficient after Year 2
Total Costs	<b>\$ 60,500</b>
<b>Net Operating Deficit</b>	<b>\$ (28,300)</b>

# BUSINESS PLAN FOR AN EVENTS CENTER

The second analysis is for an Events Center. It has been determined that this type of venue is a potential high source of revenues. However, the operating costs are equally high, and it requires good management.

## DEMOGRAPHIC AND ECONOMIC TRENDS IN THE MARKET AREA

The principal market for an Events Center at Emery Estate would be the town of Weymouth, and it would be expected that 75% of the demand for smaller and public events would be local residents, nonprofit groups and businesses. Larger events (e.g., weddings), which would produce most of the revenue for the facility, would draw from a wider market area comprised of Norfolk and Plymouth Counties. The demographics of this wider market area reflect similar trends of growth and prosperity evident in the data for the Town of Weymouth.

The combined population of Norfolk and Plymouth Counties is presently 1.16 million, an increase of 3% over 2000. The median household income has increased to \$78,500, 20% above the state average. Despite the severe recession that has affected the rest of the state, the number of jobs in the wider catchment area grew to 677,700 in 2010, a gain of 4% since 2001. Growing population, income and employment within the study area should continue to support the strong demand for unique venues for weddings and large events within the two-county market area.

## MARKET SEGMENTS

Emery Estate Events Center should target the following market segments, in order of priority:

- Social Events
  - > Weddings
  - > Parties
  - > Holiday, reunion, graduation, retirement, anniversary, birthday
  - > Memorial services, bereavement receptions
- Corporate Events
  - > Business meetings
  - > Board meetings
  - > Training sessions
  - > Board retreats
- Institution and Nonprofit Events
  - > Fundraisers
  - > Arts and culture, such as showings and plays
- Community Events
  - > Community events, such as races and festivals
  - > Family-oriented events, such as festivals and movie nights
  - > Community meetings

## STAFFING

By Year 3 of operations, the Town would have a part-time coordinator, while the events center (and farm) would have separate staffing for their facility's management.

## POTENTIAL REVENUES

In order to project the volume of events, the level of pricing and the likely revenues that could be expected from Emery Events Center by Year 3, the consultant team has considered the performance of the facilities in the Boston Metro Area with which it will be competing. These include Willowdale Estate on the North Shore, Lyman and Codman Estates in Metrowest, and Highfield Hall on the Cape.

**Table 6: PROJECTED REVENUES FOR EVENTS CENTER IN YEAR 3 OF OPERATIONS**

	<u>Mon-Thurs</u>	<u>Friday</u>	<u>Sat</u>	<u>Sun. &amp; Hol.</u>	<u>No. of Bookings</u>	<u>Rental Revenue Potential</u>
May-October						
Willowdale	\$5,000	\$5,000	\$7,500	\$6,000	78	
Lyman	\$1,000	\$2,900	\$4,000	\$3,100	45	
Highfield H NA		\$2,800	\$4,000	\$2,800	20	
Codman	\$600	\$1,000	\$1,600	\$1,600	35	
<b>Emery (1)</b>	<b>\$600</b>	<b>\$1,000</b>	<b>\$2,000</b>	<b>\$1,600</b>	<b>35</b>	<b>\$56,000</b>
November-April						
Willowdale	\$2,800	\$2,800	\$3,600	\$2,800	45	
Lyman	\$1,000	\$1,900	\$2,500	\$2,500	10	
Highfield H	\$1,500	\$1,500	\$2,800	\$1,500	2	
Codman	\$500	\$700	\$900	\$900	6	
<b>Emery (2)</b>	<b>\$100</b>	<b>\$500</b>	<b>\$750</b>	<b>\$750</b>	<b>20</b>	<b>\$ 15,000</b>
<b>Total Revenue Potential</b>						<b>\$ 71,000</b>

Willowdale, with the highest rents at \$7,500 for peak summertime Saturdays, includes use of a tent for up to 250 guests. Willowdale is the only facility that caters its events. At the other facilities, catering is outsourced. Both Willowdale and Lyman Estates include use of large air-conditioned mansions with bridal suites. Codman Carriage House includes use of the carriage house, which can accommodate up to 75 guests. Larger crowds require use of the outdoor spaces and rent a tent.

Projections assume that ground floor renovation of the House is undertaken and that access and parking have been provided. It is estimated that during the 26-week summer high season, there could be up to 55 weddings and large events by Year 3. Based on the competitive environment, peak summer Saturday night rents for Emery Estate are estimated at roughly \$2,500. During November to April, weekend rents drop to \$750, and weeknights are \$100 for Monday through Thursday, making the facility affordable for nonprofit meetings and events and family parties. Total revenue potential of an Events Center at Emery Estate is estimated to be in the region of \$132,500 by Year 3 of operations.

## PROJECTED OPERATING BUDGET

Table 7 shows the projected expenses against revenues for Year 3, the first full-year of operations of the Emery Event Center. Buildings and grounds maintenance, insurance and utilities costs are expected to be more than \$60,000 a year. The facility's projected revenues of \$91,000 are sufficient to create a surplus of \$30,000. This assumes a turn-key operation with professional events manager.

**Table 7: EVENTS CENTER OPERATING BUDGET YEAR 3 OF OPERATIONS**

### Revenues

Projected Revenues from 55 Events	\$71,000	See above
Farm	\$3,400	
Fundraising Events	\$20,000	Four fundraisers@\$5000
<b>Total Revenues</b>	<b>\$ 91,000</b>	

### Expenses

Part-Time Site Coordinator	\$15,000	
Building Maintenance	\$7,055	\$1.66 /sf based on Highfield Hall
Grounds Maintenance	\$24,800	
Utilities	\$6,035	\$1.42 /sf based on Highfield Hall
Insurance	\$7,500	
Farm	\$0	Farm is self-sufficient after Year 2
<b>Total Operating Costs</b>	<b>\$ 60,390</b>	

**Net Operating Surplus** **\$ 30,610**

### Grounds Estimate

\$14,880	\$3720 per acre * 4 acres high level maintenance
\$9,920	\$2480 per acre*4 acres standard maintenance
<b>\$24,800</b>	

Net operating surplus excludes debt service for building renovation and access & parking improvements.



## MARKETING STRATEGY

The basis of an effective marketing strategy is the development of an email database for distribution of marketing materials. The database can be developed from:

- Sign-in sheets with emails for events
- Online inquiries
- Sign-up sections on website
- Post-event surveys
- Social media, such as Facebook

Profiles, posts and blogs should be developed for posting to social media sites. Posts should reinforce Emery's brand identity and promote the facility to target audiences. Once social media content is built and project profiles are developed, profiles should be linked so that posts will simultaneously go to Twitter, Facebook, LinkedIn, YouTube and other social media platforms.

Figure 15 below shows the extensive array of social media platforms that seems to be mushrooming every day. Management should identify the best social media platforms to reach target audiences based on the market demographics and vendor recommendations. These are likely to include Twitter, LinkedIn Groups, Facebook and other website and blog platforms. Target audience groups could be segmented into social platforms and market sector groups.

**Figure 15: ELEMENTS OF A SOCIAL MARKETING STRATEGY**



The Emery Events Center should target meeting planners, weddings and events planners, tour group organizers, community groups, tourist promotion agencies, local businesses and civic leaders as well as residents of Norfolk and Plymouth Counties.

The CSA farm and Events Center should employ a social media expert to deploy the marketing strategy and to develop and post press releases, social media content and newsletters. Monthly newsletters and periodic press releases could promote use of the facility for multiple purposes and could promote classes, events and volunteering opportunities at the farm. They could also showcase fresh produce as well as recipes for unfamiliar vegetables.

Multiple website pages should be developed, and weekly posts should highlight food, education and social happenings at the farm. Press releases and media notices, logs and messages should be deployed to create further 'buzz' about Emery Estate.

## PARTNERSHIPS WITH RELATED BUSINESSES

Emery Estate marketing staff should develop direct relationships with local businesses and vendors in related industries that can help funnel business to the venue. These include wedding planners, flower vendors, caterers, tent rental companies, destination management companies, tourist bureaus and other businesses serving the events market. Special events should be held to showcase the facility to this group. Staff should join associations of meetings and weddings industry professionals and attend conferences and events.

The CSA managers should partner with local restaurants, supermarkets and distributors to maximize utilization of the produce. Additional partners could be culinary institutes for demonstration and scheduled classes.

## CONCLUSIONS

Under these financial estimates, both of the preferred options for the Estate - CSA and Events Center - will require annual fundraising to cover the differences between revenues and operating costs. From review of many similar facilities, this condition is typical, except in those situations where unique markets and the special cache of the facility provide a very strong market. Examples of these have been brought forth at meetings of the Mayor's Committee and could be set as goals for Emery Estate.

## IMPLEMENTATION

To maximize the revenue-generating uses and their contribution to the long-term management of the Estate, the Town must complete a process that allows choices to be made on the best uses and outcomes for the long term. These may change over time since the property is proposed to have multiple purposes, and the types of uses could evolve as new ideas are brought forward for sharing the property. However, a process is recommended to make choices on the major, revenue-generating uses that would be included.

The implementation of the plan will be phased. A number of improvements must be made to the property to permit all the uses that have been raised as possibilities or desirable. However, not all of the uses need major changes to the property to be activated. Therefore, the first steps should be to make the minimum preparations for near-term use of the site. This should be followed by a program of improvements that will allow the major, revenue-generating uses to develop.

Listed here are the recommended steps for implementing the plan.

## PHASING

The Town already has experience in handling events at the property, the largest so far being the Open House that the Town provided for residents to view the site prior to the Public Meeting at the Middle School. This allowed people to enter the property, park and congregate across the property and within the building, similar to any public or private event. More Town-sponsored events will be occurring in the coming months. Low-scale private events have also been requested and are possible with the current status of the property. This will continue to generate interest and keep the property active. However, at some point, more revenue must be generated to improve the building and keep the location actively used. Some improvements could be taken on by volunteer or student organizations, such as the creation of public trails through the property and some property maintenance such as some trash pick-up and painting of the garage. More substantial improvements, however, will need to be completed under contract with trade professionals.

The following aspects are considered the major elements of a property improvement phasing program:

1. **Access** – For the longer term and especially for larger events, the access must be modified so that the residents on Emery Lane do not take the majority of traffic. This will require the regrading and construction of a replacement driveway from Commercial Street. The width of the driveway at the intersection with Commercial Street could remain as two lanes if police details are stationed at the intersection during large events. However, some more significant grade changes may be necessary, and trees may have to be removed with improvements in the grade and width of the drive. A landscape architect would be the recommended design professional to determine the best alternative for the improved drive.
2. **Landscape maintenance** – Lawn mowing could be requested to be handled by the Town departments (Schools, DPW) with Town equipment. Maintenance of the gardens could be taken on by volunteers (e.g. Weymouth Garden Club) after initial restoration using professional landscapers. The limbing and removal of trees should be contracted to an arborist.
3. **Property improvements** – For either social events or a CSA, improvements to the landscape must be made. A detailed landscape plan should be drafted that coordinates the elements of the landscape improvements. For the social events, general maintenance and beautification of the lawns and gardens are needed. This may partially be a volunteer effort, but the limbing and removal of trees should be contracted to an arborist as noted above. A longer-term option is to grade the rear lawn to create a flatter area for events. This regrading could also be used to manage stormwater by adding a drainage system that controls the runoff towards down-slope properties. Other improvements could be made to facilitate the CSA, hide on-site parking and further manage stormwater runoff.
4. **Building maintenance** – Exterior improvements anticipated for the main building include painting, windows and roof. Interior improvements could wait pending decisions on new uses. However, use of the current space for assembly



on the first floor will require consideration for egress and toilets. The needed improvements are discussed earlier in this report. Less significant maintenance could be made to improve the Carriage House and make it suitable as an area for seasonal activities. The Children's Playhouse requires more significant improvements and should be held aside until a final decision is made on its disposition.

5. **Building improvements** – Based on architectural and engineering assessments of the buildings, decisions could then be made on more substantial changes to support the preferred uses. The capital necessary to make these changes is presumed to be from municipal bonds issued by the Town, so careful analyses and decisions are needed. The costs and bonding are discussed earlier in this report. Other funding options are listed below.
6. **Management** – As the property is improved and events and uses expand, the management structure should change to be responsive to the needs for more oversight, marketing and upkeep.

## PHASES

The phases are as follows:

**Phase 1: Grounds Restoration and Main Building Maintenance** – The first step is to restore the exterior of the Main Building to preserve it and make the building more attractive for outdoor events. The former formal gardens and landscaping around the property are to be restored to create a more attractive condition for outdoor events and public enjoyment. Pruning and removal of trees to restore the vista to the North would be included in this phase. Some of these actions could be undertaken by volunteers. The Children's Playhouse would be closed and "mothballed" or demolished if non-salvageable. Event parking will be limited to the lawns when dry and to off-site parking with shuttles when wet or when there are larger assemblies. The area for the CSA farm will be determined and committed to the terms agreed upon with the farmer.

**Phase 2: Grounds Improvements, Access Improvements, and Parking** – The grounds would be improved with a formal trail system of 2,400 LF to traverse about 12 acres, creating a more formal and attractive walking/biking route around the property. To support larger events, the event parking area is constructed with low impact design standards, and the access to Commercial Street is improved to redirect the higher levels of traffic.

**Phase 3: Main House, First Floor Renovations** – Renovations and improvements to the first floor of the main house would include accessibility, bathrooms, meeting space and potentially kitchen facilities, thereby reducing the need for additional rental equipment and facilities for the events and permitting uses of the building for smaller-scale inside events. Expansion of the trail system and other recreational areas could be instituted at this phase.

**Phase 4: Remaining Building Improvements** – The upper floors of the Main Building and other building improvements, including the Children's Playhouse if not demolished, would be completed in the fourth phase. This would allow the upper floors to be rented if an appropriate use or uses are found. The Carriage House could also be put into more productive use with improvements to the interiors.

## COSTS

Projected costs were estimated for each of the improvements that would support the mix of preferred uses of the property. These projected costs were then divided into the proposed phases for improvements that match the projected demands on the site for revenue-generating events and uses, while adding improvements that would be appreciated by the Town's people by increasing their use and enjoyment of the site. The phased projected costs are shown in Table 7 on the following two pages. (The projected costs are based on estimates, which are provided in Appendix E.)

**Table 7: EMERY ESTATE CAPITAL COST PROJECTIONS**

**Phase 1. Vista and Building Maintenance**

**A. Capital Investment**

Vista pruning	\$ 12,000
Mothball Childrens Playhouse	\$ 10,000
Improve Exterior of Main House	\$ 150,000
Subtotal	\$ 172,000
Contingency [5%]	\$ 8,600
Total Project Costs	\$ 180,600
Other Funds (Donations, CPA: Recreation)	\$ -
Bonded Amount	\$ 180,600

**B. Cost if Bonded**

Term	10 years									
Rate	3.4%									
Payments	Year:	1		2		3		4		5
	\$	24,200	\$	23,586	\$	22,972	\$	22,358	\$	21,744

**Phase 2. Grounds and Event Access and Parking**

**A. Capital Investment**

Access to Commercial Street	\$ 165,000
Parking lot	\$ 560,000
Grounds Restoration and Improvements	\$ 109,200
Subtotal	\$ 834,200
Contingency [5%]	\$ 41,710
Total Project Costs	\$ 875,910
Other Funds (Donations, CPA: Recreation)	\$ -
Bonded Amount	\$ 875,910

**B. Cost if Bonded**

Term	10 years									
Rate	3.4%									
Payments	Year	1	2	3	4	5				
	\$	117,372	\$	114,394	\$	111,416	\$	108,438	\$	105,460

**Phase 3. First Floor Interior of Main House**

**A. Capital Investment**

First Floor Main House	\$ 602,100
Subtotal	\$ 602,100
Contingency [5%]	\$ 30,105
Total Project Costs	\$ 632,205
Other Funds (Donations)	\$ -
Bonded Amount	\$ 632,205

**B. Cost if Bonded**

Term	20 years									
Rate	3.4%									
Payments	Year	1	2	3	4	5				
	\$	53,105	\$	52,030	\$	50,956	\$	49,881	\$	48,806

## Phase 4. Other Buildings

### A. Capital Investment

Other buildings	\$ 1,399,150
Subtotal	\$ 1,399,150
Contingency [5%]	\$ 69,958
Total Project Costs	\$ 1,469,108
Other Funds (Donations)	\$ -
Bonded Amount	\$ 1,469,108

### B. Cost if Bonded

Term	20 years					
Rate	3.4%					
Payments	Year	1	2	3	4	5
		\$ 123,405	\$ 120,908	\$ 118,410	\$ 115,913	\$ 113,415

## SELECTION PROCESS FOR MANAGERS AND MAJOR USES

The use of the property for small-scale public events and passive recreation is a basic requirement. However, this plan recommends that a manager or managers for the property be chosen to handle scheduling and large-scale events or major uses, and the acceptance of uses that generate the major revenues should follow a formal process.

During the course of this planning effort, a number of professionals and interested parties were contacted or made contact with the Town and consultants, and they expressed their interest in submitting proposals for use of the property that could be beneficial to the Town's interests. By using a state-enabled process of Requests for Proposals (RFP) - found in MGL c.30B, Uniform Procurement Act - the Town could determine the level of interest and range of possible uses and create the basis for making choices between competitive and cooperative plans for the Estate.

**Request for Letters of Interest** – The Town will issue a Request for Letters of Interest (RFI) from prospective entities. An information package and briefing would be provided that summarizes the intended RFP and process and solicits statements of interests. This preliminary step has distinct advantages in providing opportunities to gauge interest, respond to concerns and questions before finalizing the RFP, target the final marketing effort, and provide opportunities for potential proponents to identify possible partners or joint ventures in advance of the final RFP issuance. This step would take about 6 to 8 weeks.

**Request for Proposals** – The Town will then issue a RFP. This is a formal process that requires certain notifications and legal reviews. To be effective, the RFP process must be designed and marketed correctly so that the proposers have a clear definition of what the Town goals are and how the proposals will be evaluated. The distribution and outreach for the RFP is also critical to ensure that the request goes out to entities most interested and effective in programs for these types of properties.

These proposals would be required to include information upon which the Town could rank the proposals. The comparative evaluation review criteria would be used as the basis for ranking and choosing the most advantageous proposal.

## COMPARATIVE EVALUATION CRITERIA FOR THE SELECTION PROCESS

When considering proposals for managers and major uses of the property, a set of criteria for comparative analyses should be decided on prior to requesting proposals. In this way, it is clear the Town can clearly list its goals for the proposers and show what will be the bases for choosing the preferred alternative.

The Emery Estate Advisory Committee reviewed a set of criteria proposed by the consultants for the purpose of adding these criteria in a RFP. The Committee also ranked the criteria according to higher and lesser importance. The list of criteria and the scoring by the Committee are included in the attachments.

While the RFI/RFP process requires substantially more legal documentation than these criteria, this approach highlights the key goals represented by the Committee - to propose private revenue-generating uses, events and programs with the highest level of revenue possible and the lowest cost to the Town.

## FUNDING OPTIONS

Other than the use of Town funds - including CPA funds - for the needed capital investment in the property, there are several other funding sources that could be explored. Most of these programs require matching funds.

**Public Fund Raising** - The Town could support 'public' fundraising efforts with private donations. As an example, the Town of Stockbridge has raised \$1.5 million for restoration of the Old Town Hall through donations.

**Massachusetts Preservation Projects Fund** - The Massachusetts Preservation Projects Fund (MPPF) is a state-funded 50% reimbursable matching grant program that supports the preservation of properties, landscapes and sites (cultural resources) listed in the State Register of Historic Places. The restoration of historic Highfield Hall in Falmouth was funded with this program.

**The National Trust Preservation Fund** - The National Trust includes funds that provide two types of assistance to non-profit organizations and public agencies:

- Matching grants for preservation planning and educational efforts
- Intervention funds for preservation emergencies

**Massachusetts Cultural Council** – The Cultural Council's programs include funding for cultural activities that can result in historic preservation.



# ATTACHMENT

A large, light blue, serif capital letter 'A' is positioned behind the word 'ATTACHMENT'. The letter is semi-transparent, allowing the text to be seen through it.

EMERY ESTATE ADVISORY  
COMMITTEE MEETING MINUTES

# ATTACHMENT B

## LEGAL DOCUMENTATION

- MGL chap. 44B Community Preservation Act excerpts
- MGL chap. 44 sec.7
- Copy of Emery Estate deed
- Copy of Summary Bond Statement for Emery Estate Acquisition

## Chap 44B Community Preservation

### Section 12. Real property interest; deed restriction; management

(a) A real property interest that is purchased with monies from the Community Preservation Fund shall be bound by a permanent deed restriction that meets the requirements of chapter 184, limiting the use of the interest to the purpose for which it was acquired. The deed restriction shall run with the land and shall be enforceable by the city or town or the commonwealth. The deed restriction may also run to the benefit of a nonprofit, charitable corporation or foundation selected by the city or town with the right to enforce the restriction.

(b) Real property interests acquired under this chapter shall be owned and managed by the city or town, but the legislative body may delegate management of such property to the conservation commission, the historical commission, the board of park commissioners or the housing authority, or, in the case of interests to acquire sites for future wellhead development by a water district, a water supply district or a fire district. The legislative body may also delegate management of such property to a nonprofit organization created under chapter 180 or chapter 203.

MGL Chapter 44, Section 7. Cities and towns may incur debt, within the limit of indebtedness prescribed in section ten, for the purposes hereinafter set forth, and payable within the periods hereinafter specified or, except for clauses (3C), (11), (16), (18), (19), (21) and (22), within such longer period not to exceed 30 years based upon the maximum useful life of the public work, improvement or asset being financed, as determined in accordance with guidelines established by the division of local services within the department of revenue:

(1) For the construction or reconstruction of surface drains, sewers, sewerage systems and sewage treatment and disposal facilities, thirty years.

(1A) For the lining by cement or metal of sewers constructed for sanitary and surface drainage purposes and for sewage disposal, ten years.

(2) For acquiring land for public parks or playgrounds or public domain under chapter forty-five, thirty years; but no indebtedness incurred for public domain shall exceed one half of one per cent of the equalized valuation of the city or town.

(2A) For the construction of an artificial ice-skating rink for which refrigeration equipment is required on land owned by the city or town, fifteen years.

(2B) For the construction of an outdoor swimming pool on land owned by the city or town, fifteen years.

(3) For acquiring land, or interests in land, for any purpose for which a city or town is or may hereafter be authorized to acquire land or interests therein, not otherwise specifically provided for; for the construction of buildings which cities or towns are or may hereafter be authorized to construct, or for additions to such buildings where such additions increase the floor space of said buildings, including the cost of original equipment and furnishings of said buildings or additions, twenty years. ...



CERTIFY

*William P. O'Donnell*  
WILLIAM P. O'DONNELL, REGISTER

Deed

We, Arthur H. Emery and Allan C. Emery, III, in our capacity as successor Trustees of the King Oak Hill Nominee Trust, u/d/t dated November 21, 1983 registered with the Norfolk Registry District of the Land Court as Document No. 443832, for consideration of \$1,850,000.00 paid, grant to The Town of Weymouth, a municipal corporation, with Quitclaim Covenants, the following parcels of real estate, with the buildings and improvements thereon, known and numbered as 790 Commercial Street, Weymouth, Norfolk County, Massachusetts:

\* 75 Middle St., Weymouth, MA 02189

PARCEL ONE (registered) 184-1 & 59

Those two certain parcels of land being shown as lot 2 and lot 3 on Land Court Plan 36437A, a copy of a portion of which is filed with the Norfolk Registry District with Certificate No. 108247, Sheet 1 to 5, Book 542.

Said lot 2 and lot 3 are described more fully in Certificate of Title No. 117720, in Book 589, Page 120 in said Registry District, and are conveyed together with and subject to all matters set forth or referred to in said Certificate and in the encumbrance sheet attached thereto to the extent applicable to said lots.

PARCEL TWO (unregistered) (184-76)

A certain parcel of land shown as Lot 3C on the Plan recorded with Norfolk Registry of Deeds as Plan 49 of 2002 in Book 4, beginning at a point on the southerly side of Eden Street and at the easterly most portion of Lot 3, thence:

N 56°-03'-54" W: 120 feet along said Eden Street; thence  
S 33°-56'-06" W: 14.84 feet by land of Lot 3; thence  
S 63°-07'-01" E: 120.91 feet by land now or formerly of Allan C. Emery to the point of beginning.

Said parcel contains 890 square feet more or less.

Meaning and intending to convey and hereby conveying the same premises described in a deed from Washington Realty, Inc. dated January 3, 2003, recorded with Norfolk Registry of Deeds in Book 17965, Page 499.

Parcels One and Two are conveyed subject to easements, restrictions, agreements and other matters of record to the extent now in force and applicable, and to real estate taxes not yet due and payable, which the grantee by acceptance and recording of this deed, assumes and agrees to pay

- 1 -

Address of Property: 790 Commercial Street  
Weymouth, MA 02189

HAND TO  
LAND COURT

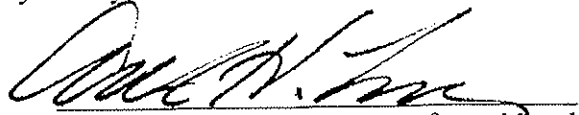
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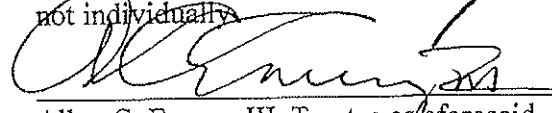
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EXECUTED under seal this 5<sup>th</sup> day of July, 2011.

  
Arthur H. Emery, Trustee as aforesaid and  
not individually

  
Allan C. Emery, III, Trustee as aforesaid  
and not individually

On this 5<sup>th</sup> day of July, 2011, before me, the undersigned notary public, personally appeared Arthur H. Emery, proved to me by satisfactory evidence of identification, being (check whichever applies):


☒ driver's license or other state or federal governmental document bearing a photographic image,

☐ oath or affirmation of a credible witness known to me who knows the above signatory, or

☐ my own personal knowledge of the identity of the signatory,

to be the person whose name is signed on the preceding or attached document, and acknowledged to me that he signed it as Trustee voluntarily for its stated purpose.

Signed by me in Peabody, Essex County, Massachusetts.

  
Notary Public (signature and seal)  
My commission expires: 10/13/11

On this 5<sup>th</sup> day of July, 2011, before me, the undersigned notary public, personally appeared Allan C. Emery, III, proved to me by satisfactory evidence of identification, being (check whichever applies):

☐ driver's license or other state or federal governmental document bearing a photographic image,

☐ oath or affirmation of a credible witness known to me who knows the above signatory, or

☒ my own personal knowledge of the identity of the signatory,

to be the person whose name is signed on the preceding or attached document, and acknowledged to me that he signed it as Trustee voluntarily for its stated purpose.

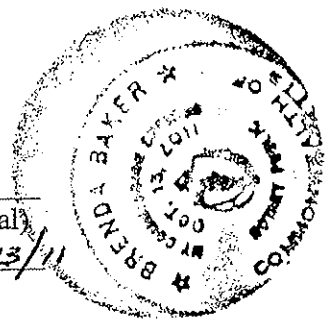
Address of Property: 790 Commercial Street  
Weymouth, MA

Signed by me in Peabody, Essex County, Massachusetts.

Brenda Baker

Notary Public (signature and seal)

My commission expires: 10/13/11



*TOWN OF WEYMOUTH*

*IN COUNCIL*

ORDER NO. 11 096

JUNE 3, 2011

INTRODUCED: MAYOR

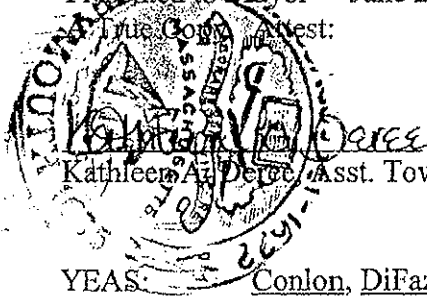
COMMUNITY PRESERVATION FUND LAND PURCHASE

Upon request of her Honor, Mayor Kay, the Town of Weymouth, through the Weymouth Town Council approved the appropriation of \$1,900,000.00 to pay the costs of purchasing the King Oak Hill Property, so called. Consisting of a total of 23.96 acres, more or less and more formally described on Assessors' Map 14, Lot 184-1 (23.68 acres more or less), lot 184-59 (0.26 acres more or less) and Lot 184-76 (0.02 acres, more or less), and for the payments of all other costs incidental and related thereto, and to meet this appropriation, the Treasurer with the approval of the Mayor is authorized to borrow said amount under and pursuant to Chapter 44, Section 7 (3) and Chapter 44B, Section 7 (3) and Chapter 44B of the General Laws, or pursuant to any other enabling authority, and to issue bonds or notes of the Town therefor.

Passed in Council -- June 20 2011

Presented to Mayor -- June 21, 2011

True Copy Attest:



Kathleen A. DeRetz, Asst. Town Clerk

Approved

Date

6/22/11

Mayor

Susan M. Kay

YEAS: Conlon, DiFazio, Harrington, Lacey, Mathews  
McDonald, Molisse, O'Connor, Pap, Smart, Whitaker

NAYS: Conlon, DiFazio, Harrington, Lacey, Mathews  
McDonald, Molisse, O'Connor, Pap, Smart, Whitaker



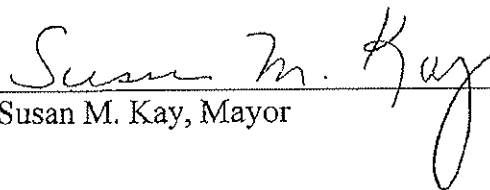
CERTIFICATE OF AUTHORIZATION TO ACCEPT DEED

I, Susan M. Kay, the Mayor of the Town of Weymouth duly authorized, and in accordance with Section 2-205 of the Weymouth Code of Ordinances, do hereby accept, on behalf of the Town of Weymouth, the Deed to the Emery Property- so called, the same being:

Parcel One: those two certain parcels of land being shown as lot 2 and lot 3 on Land Court Plan 36437A, a copy of a portion of which is filed with the Norfolk Registry District with Certificate No. 108247, Sheet 1 to 5, Book 542. Said lot 2 and lot 3 are described more fully in Certificate of Title No. 117720, in Book 589, Page 120 in said Registry District.

Parcel Two: a certain parcel of land shown as Lot 3C on the Plan recorded with Norfolk Registry of Deeds as Plan 49 of 2002 in Book 4. Said parcel contains 890 square feet more or less.

TOWN OF WEYMOUTH

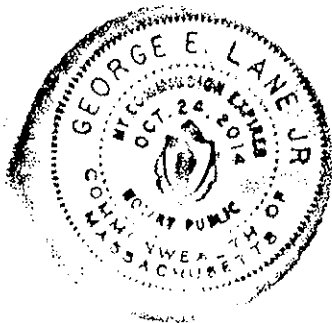
  
Susan M. Kay, Mayor


COMMONWEALTH OF MASSACHUSETTS

Norfolk, ss.

August 3, 2011

Then personally appeared the above named, SUSAN M. KAY, MAYOR, for the Town of Weymouth, before me, the undersigned Notary Public and proved to me by satisfactory evidence of identification, being a driver's license, to be the person whose name is signed above, and acknowledged the foregoing to be signed by her voluntarily for its stated purpose.



  
George E. Lane, Jr., Esquire, Notary Public  
My Commission Expires: 10/24/14

which the town has an interest. The mayor, after consultation with the town solicitor, may prosecute such suits to final judgment, or may compromise any claims by and against the town on such terms as seem to the mayor and town solicitor to be in the best interests of the town, whether or not such claims are in litigation.

The mayor shall have authority in the name of the town and through the town solicitor to prosecute, defend or compromise any and all claims or suits to which the town is a party and in relation to claims and suits whenever in the judgment of the mayor it is reasonably necessary, except actions otherwise provided for by statute or by ordinance.

**SECTION 2-204      *Authority to Settle Workmen's Compensation Matters***

All payments by the town for workmen's compensation shall, on the approval of the mayor, be charged to the workmen's compensation claims fund, or the damages and claims account as shall in each such case be deemed to be most appropriate.

**SECTION 2-205      *Authority to Accept Deeds and to be in charge of Property***

The mayor shall be authorized to accept deeds conveying an interest in real estate to the town. The Mayor shall notify the Town Council whenever such acceptance occurs. All land owned by the town which is not by vote of the town specifically assigned to some particular town agency shall be deemed to be under the authority of the mayor. The mayor shall have general direction or management of the property and affairs of the town in all matters not otherwise provided for unless otherwise provided by law.

**SECTION 2-206      *Authority to Manage Town Property and Affairs***

The mayor shall have authority to sell or otherwise dispose of personal property and any real estate of which the town has possession or title by following the procedures established in chapter thirty B of the General Laws.

Whenever a town agency to which any land, easement, or other right or interest in land has been assigned determines that the land, easement, or other right or interest in land is no longer required by the agency it shall, forthwith, notify the mayor of such determination and shall identify, with specificity, the land, easement, or other right or interest in land which it has deemed to be no longer needed by the town agency.

The mayor upon receipt of any such determination shall, forthwith, refer the matter to the department of planning and community development for a report and recommendation. The department of planning and community development shall, after study and analysis, file a report containing its recommendations and the reasons for such recommendations, with the mayor.

Whenever any owned land, easement, or other right or interest in land is to be sold the mayor shall file a request to authorize such sale with the town council. The town council may, by a two-thirds vote, authorize the conveyance of such land, or a portion thereof, or the abandonment of an easement or other right or interest in the land. The town council may specify a minimum sum to be paid to the town for such conveyance or abandonment.

The mayor shall advertise and otherwise give notice of the offer to convey or abandon the land, easement, or other right or interest in land in accordance with the provisions of chapter 30B of the General Laws and any other provisions of law as may be applicable. If the town council has specified a minimum amount the mayor may, for such amount or any larger amount and on such



TOWN CLERK

**Town of Weymouth, Massachusetts**  
**\$1,900,000 General Obligation Bonds; Dated November 2, 2011**  
**New Money - Land Acquisition (I)**  
**Ch. 44 s. 7(3) auth. 6/22/11**

**Debt Service Schedule**

Date	Principal	Coupon	Interest	Total P+I	Fiscal Total
11/02/2011	-	-	-	-	-
03/15/2012	-	-	24,392.57	24,392.57	-
06/30/2012	-	-	-	-	24,392.57
09/15/2012	190,000.00	5.000%	33,012.50	223,012.50	-
03/15/2013	-	-	28,262.50	28,262.50	-
06/30/2013	-	-	-	-	251,275.00
09/15/2013	190,000.00	5.000%	28,262.50	218,262.50	-
03/15/2014	-	-	23,512.50	23,512.50	-
06/30/2014	-	-	-	-	241,775.00
09/15/2014	190,000.00	3.250%	23,512.50	213,512.50	-
03/15/2015	-	-	20,425.00	20,425.00	-
06/30/2015	-	-	-	-	233,937.50
09/15/2015	190,000.00	2.000%	20,425.00	210,425.00	-
03/15/2016	-	-	18,525.00	18,525.00	-
06/30/2016	-	-	-	-	228,950.00
09/15/2016	190,000.00	2.250%	18,525.00	208,525.00	-
03/15/2017	-	-	16,387.50	16,387.50	-
06/30/2017	-	-	-	-	224,912.50
09/15/2017	190,000.00	2.500%	16,387.50	206,387.50	-
03/15/2018	-	-	14,012.50	14,012.50	-
06/30/2018	-	-	-	-	220,400.00
09/15/2018	190,000.00	2.500%	14,012.50	204,012.50	-
03/15/2019	-	-	11,637.50	11,637.50	-
06/30/2019	-	-	-	-	215,650.00
09/15/2019	190,000.00	3.250%	11,637.50	201,637.50	-
03/15/2020	-	-	8,550.00	8,550.00	-
06/30/2020	-	-	-	-	210,187.50
09/15/2020	190,000.00	4.000%	8,550.00	198,550.00	-
03/15/2021	-	-	4,750.00	4,750.00	-
06/30/2021	-	-	-	-	203,300.00
09/15/2021	190,000.00	5.000%	4,750.00	194,750.00	-
06/30/2022	-	-	-	-	194,750.00
<b>Total</b>	<b>\$1,900,000.00</b>	<b>-</b>	<b>\$349,530.07</b>	<b>\$2,249,530.07</b>	<b>-</b>

**Yield Statistics**

Bond Year Dollars.....	\$10,201.94
Average Life.....	5.369 Years
Average Coupon.....	3.4261123%
Net Interest Cost (NIC).....	2.3426668%
True Interest Cost (TIC).....	2.2382323%
Bond Yield for Arbitrage Purposes.....	2.1077643%
All Inclusive Cost (AIC).....	2.3936213%

**IRS Form 8038**

Net Interest Cost.....	2.0672275%
Weighted Average Maturity.....	5.440 Years

File | Weymouth Long Term after 2007 Refunding.sf | 11-11-02 Cur Ref and NM b

# ATTACHMENT



## PROJECT EVALUATION CRITERIA

The Committee was provided with the following list of potential criteria for use in choosing between different options for use and management of the Emery Estate. The Committee was provided with four votes for highest priority criteria and four votes for lower priority criteria. The results are shown in the following table.

As noted, the Committee focused on private, revenue-generating uses with low operating costs for the town. The Committee would like to see the highest returns possible from the revenue-generating use after a reasonable start-up period of three years.

Criteria	High Importance	Lower Importance
<b><i>Financial Criteria</i></b>		
Lowest start-up costs	2	1
Lowest operating costs	4	
Lowest level of public investment	1	
Lowest risk for public or private investment		1
Greatest return on public investment	1	
Easiest to finance		1
Highest level of revenue generation [within three years]	4	1
Greatest ability to subsidize with other funds and grants		
Greatest number of local jobs created	1	3
<b><i>Multiple Events Criteria</i></b>		
Private revenue-generating uses, events and programs	6	
Free public events	3	1
Revenue-generating public events		3
<b><i>Public Uses Criteria</i></b>		
Largest number of spaces for public use		1
Widest variation in types of public use	2	1
Widest range of different group use options	2	1
Most options for cultural activities in terms of space and times		
Most options for educational programs in terms of space and times		
Lowest security risk		
Highest public safety		2
<b><i>Design and Impacts Criteria</i></b>		
Lowest level of modifications to property and its character	1	3
Greatest compatibility with and least impact for adjacent neighbors	3	1
Greatest ability to accommodate peak parking demand with the least amount of on-site parking		2
Lowest level of traffic generation		3
Lowest level of modification to public streets and utilities		4
Highest level of conformance with applicable regulations		1
<b><i>Preservation Criteria</i></b>		
Greatest level of preservation of structures	1	2
Greatest level of landscape preservation	3	1
<b><i>Ownership Criteria</i></b>		
Highest level of public ownership retained		2
Lowest level of public ownership responsibilities	2	1



# ATTACHMENT

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CASE STUDIES

# Willowdale Estate Case Profile

Willowdale Estate is a 15,000 SF early twentieth century fieldstone house in the 700-acre Bradley Palmer State Forest in Topsfield, MA. The House is a DCR-owned, privately-leased-events center providing site rental and catering services, mainly for weddings. This year, the house will host 115 weddings, most of which are during the high season months of April through October. It is run by a professional hotelier who is supported by 25 staff. A brief case profile of the facility examining management, facilities and services, mix of events, and staffing support is presented below.

## Ownership and Management

Willowdale Estate is owned by Massachusetts Department of Conservation and Recreation. It was renovated under the State Historic Curatorship Program. Under this program, the State requests bids from businesses that pay for rehabilitation and on-going maintenance for historic houses in exchange for rent-free long term leases. For-profit operators are eligible to bid on Curatorship Program properties.

In 1997, the Fandetti-Forsythe family, who operates several boutique hotels in the Boston area, submitted a successful bid to spend \$2 million on renovating the house for a bed and breakfast hotel. Due to a number of factors, the renovation was not completed until 2007. As a result of market shifts during the ten year interval between bid award and opening, the business plan was changed from Hotel to Events Center. At present, Hospitality Suites are available to wedding parties for dressing and preparation. The bridal couple sometimes stays overnight in the mansion during low-season months (Nov-March). During the season, the property is fully booked for Friday, Saturday and Sunday nights, so overnight stays are not available.

## Facilities and Services

Up to 130 people can be accommodated inside the mansion for a sit-down event. Seating is in two reception rooms on the ground floor connected by an archway. During May-Oct., use of the Tent Pavilion, which can accommodate up to 250 people, is included in the site rental fee. About two-thirds of high season weddings are tented.

The facility has four restrooms with five toilets on the ground floor and three additional bathrooms for the Bride and Groom Hospitality Suites upstairs. There is parking for 65 cars. For events of over 150 people, valet parking service is outsourced to



a third-party vendor. The \$1000 to \$1500 fee for this vendor is paid by the wedding party.

Unlike most other Estate Events Centers where catering is outsourced, Willowdale Estate caters all events in-house. A standard weddings package is available for large events for \$99 per person. Bar service is an additional \$5 per person, not including the liquor costs. Since Topsfield is a dry town, the facility doesn't have a liquor license. Renters must bring all liquor to the facility, which is licensed by the town to serve liquor but not to sell it. Thus, a cash bar is not an option.

## Private Events

The facility hosts two principal types of events: Weddings and Corporate Events. Due largely to target marketing, weddings comprise 90% of events, with corporate dinners and lunches comprising most of the rest. The facility targets corporate use of facilities during the week and during the low season, but has not promoted these events to the extent that it has marketed the facility for weddings. The marketing team plans to pursue the corporate market more aggressively in the future.

### CHARGES AND BOOKINGS FOR EVENTS

Season		Fridays and Sundays	Saturdays	Holiday Sundays	Catering Charge (per person)	Number of Events
All Events	May-October	\$ 5,000	\$ 7,500	\$ 6,000	\$ 99	78
All Events	November-April	\$ 2,800	\$ 3,600	\$ 2,800	\$ 99	45
Total Events						123

The table above shows high and low season site rental rates for weddings at Willowdale Estate. Top rents; \$7500, are charged for weekend weddings during the April-October high season. The rents drop down to \$2800 for Fridays and Sundays during the low season winter months.

When the facility started in 2007, 30 weddings were booked, supported by four staff. During the second season, 60 weddings were booked and the staff was expanded. 100 weddings were held during the third season. Now, the facility is operating at nearly full capacity for weekend weddings.

Three are a total of 123 weddings booked for 2012; an average of 2.4 weddings per weekend. Two-thirds of weddings occur during the May-October High Season. Two-thirds of the high season weddings are large events held in the Tent Pavilion. For the 2012 high season (May-Oct.), all 3 weekend days are fully booked. During the low season months (Nov-April) this year, the facility will host 1 to 2 weddings each weekend.

Site rental for weddings includes:

- Private use of the Estate for 5 hours
- Use of Tent Pavilion (May – Oct)
- On-site Parking (limited)
- Use of Hospitality Suites
- Tables and Chairs
- Bathrooms
- Power Supplies for lights and bands for tent weddings

About a dozen corporate dinners and holiday parties are held each year, or about one per month. Corporate events do not pay the site rental fee. They pay at a reduced rate of \$79 per person for catering and a \$3 per person bar setup charge.

## Public Events

Under the DCR Historic Curatorship Program, the facility is required to host community social, educational, cultural, and recreational events and programs. Six events a year are held as part of the Estate's "Signature Events" program. Signature Events for 2012 are listed below.

### SIGNATURE EVENTS AT WILLOWDALE ESTATE 2012

		Free Event
April 24	Open House	Yes
May 8	Artist Open Hours	Yes
June 12	How to create a Butterfly Garden	No
July 17	Family Movie Night - E.T.	No
Sept. 18	Tour of Willowdale Estate	Yes
Nov. 27	Annual Holiday Concert	No

Half of these are free events; the Open House, the Estate Tour, and the Artist Open House. The Artist Open House is an event for local artists who are invited to paint The Estate. These are largely promotional events that are intended to showcase the Estate for weddings and corporate parties. Ticketed events include a gardening class, a movie for kids, and a holiday concert.

## Staffing

Willowdale Estate's success as a wedding venue is underpinned by a staff of 25 people who work 30-40 hours a week. The facility employs executives, sales and marketing personnel, planning and production staff, culinary managers, and facilities management personnel. Fulltime staff includes:

### Executives

Executive Director  
Director of Planning & Development

### Sales and Marketing

Sales Administrator  
Sales Associates (2)

### Planning and Production

Planning Manager  
Production Manager  
Assistant Planning Manager  
Planning Administrator  
Production Assistants (2)  
Wedding Coordinators (2)

### Culinary

Culinary Manager  
Event Chef

### Facilities Management

Facility Manager  
Assistant Facility Manager  
Grounds and Maintenance

In addition, 10 part-time catering staff are employed for cooking and serving.

## Budget Estimate

Since Willowdale Estate is privately-owned, it is not possible to get budget information for the facility. The facility is also somewhat unique in that it offers on-site catering, which is a major source of revenue. Based on staffing and price information, we would estimate that revenues are in the region of \$1.75 to \$2 million a year, while expenses might range around \$1.25 million to \$1.5 million, for a possible profit of \$250,000 to \$750,000 per annum.

# Lyman Estate Case Profile

The Lyman Estate mansion in Waltham, is thirty-seven acres of lawns, gardens, and historic greenhouses. The mansion is a National Landmark. The Estate is available for social and corporate events, including weddings and private parties, corporate events and outings, business meetings, and holiday parties.

The Lyman Estate was built in 1793 by a wealthy shipping magnate, Theodore Lyman, and stayed in the family for 150 years. Originally used as a summer home, the Federal-style mansion was designed by Salem architect Samuel McIntire. In 1952, the Estate's heirs donated the property to Historic New England, a non-profit organization that collects and preserves buildings, landscapes, and objects dating from the seventeenth century to the present. Historic New England owns and operates thirty-six historic sites in five states. Five of these are in the Boston area; the others in Connecticut, New Hampshire, and Maine. They are all rented out for functions.

The Lyman Estate can accommodate groups of up to 140 inside the house and up to 175 for tented events on the lawn. It is fully air conditioned. There are 100 parking spaces and four bathrooms for guests, one of which is handicapped accessible.

The 14,000 sq. ft. house is an example of Federal period architecture, with columned reception rooms, high ceilings, and elegant architectural detail. The house offers seven rooms for private events: an oval parlor with original, hand-carved woodwork; a wood-paneled Victorian library; an east parlor, and a pillared dining room. The 800 sq. ft. ballroom with crystal chandeliers, classical columns, and a marble fireplace, can accommodate up to 90 people. A grand staircase with a Palladian window is popular for wedding photos. Two well-furnished changing rooms for wedding parties are available on the second floor.

# Events

The table below shows average annual bookings at Lyman House over the past few years. Some forty-five events are booked in a typical year. Forty of these are weddings, with the balance being private birthday, anniversary parties, and bat and bar mitzvahs. Over three-quarters of events are held during high season. Because the house is larger and more elegant than facilities at Codman Estate Carriage House, the rent is more than double the Codman rent. Rents start at \$1000 for weeknights during the winter months up to \$4000 for Saturday nights from May to October. Because the house is the main attraction, only about five weddings a year during high season are tented.



CHARGES AND BOOKINGS FOR EVENTS

	Season	Mon to Thurs	Friday	Saturday	Sundays & Holidays	Avg. Annual Bookings
All Events	May-October	\$ 1,000	\$ 2,900	\$ 4,000	\$ 3,100	35
All Events	November-April	\$ 1,000	\$ 1,900	\$ 2,500	\$ 2,500	10
Total Events						45

The rental fee includes:

- Exclusive use of the historic mansion and thirty-seven acres of landscaped grounds
- Private changing rooms for the bride and groom
- Expert planning guidance from Lyman event staff
- Supervisor throughout the entire event
- Assistance with on-site ceremonies
- Coordination of deliveries
- Ample on-site parking and parking attendant
- Use of 150 white folding chairs and twenty round tables
- One-year Historic New England membership

- On-site baby grand piano
- Air conditioned and handicapped accessible mansion





## Community Access

Reportedly due to lack of demand from the community, Lyman Estate is not used for community events or meetings. The house is open one Saturday a month for an admission charge of \$6.00. The main attraction is the house itself; because it is used for events, there is no antique furniture or art to see.

## Staff

Two full-time staff are employed to coordinate private events; an Events Supervisor and an assistant. Support staff for maintenance, landscaping, and cleaning are provided by Historic New England, which operates 36 properties throughout the region. No information on staff salaries or on the financial performance of the facility is available.





# Highfield Hall Case Study

Highfield Hall is the meticulously restored 1878 home of the Beebe family, now transformed into a vibrant center of cultural and community activity on in the Town of Falmouth on upper Cape Cod. The Hall hosts numerous educational programs, concerts, art exhibitions, weddings, corporate events, and private parties. It is surrounded by the 400-acre town-owned Beebe Woods. Highfield Hall is in use for programs and activities year-round, and is open to the public every day between April and mid-December.

Highfield Hall is run by Historic Highfield Inc., a non-profit corporation dedicated to preserving the legacy of Highfield Hall for future generations, to making it a welcoming home for cultural and community life in Falmouth, and to interpreting its architecture and history for visitors. Falmouth has a year-round population of 33,000 which swells to 103,000 during the height of the summer season. According to Highfield's Director, without the support of the large and prosperous summer population, Highfield Hall could not raise the necessary funds to cover its costs.

## History

The story of Highfield Hall coincides with the arrival of the railroad in Falmouth on July 18, 1872. Direct rail service to Boston and train transformed the area from a quiet fishing village to an exuberant resort community. Among the first newcomers escaping the heat of the city were the Beebes of Boston. They bought more than 700 acres of land on the hill above the railroad station, more than half of which has been preserved as Beebe Woods.

In 1875, the family built a lavish 16,000 sq. ft. "summer cottage" in the Queen Anne stick style modeled after the British Pavilion in the great 1876 Philadelphia Centennial Exposition. For over fifty years, the Beebes lived and entertained here. During the 1930's and 1940's the Hall was converted into a health resort and then, a religious retreat. In the 1950's, Arthur Beckhard ran the mansion as a hotel and converted the former stable into what is now Highfield Theater.

Highfield Hall operated as a center for the performing and the visual arts during the 1950's and 1960's. In 1972, the entire estate was purchased by Josephine and Josiah K Lilly III. The Lillys gave the nearly 400 acres of Beebe Woods to the town for permanent conservation as green space. The buildings and acreage on which they stood were donated to a local arts organization, which didn't have the resources to maintain it.

In the late 1970's, Highfield Hall was abandoned and entered two decades of neglect and vandalism. In 1994, a demolition permit was pulled by the house's owners. An advocacy group, Friends of Highfield, sprang into action to save the building. That group became Historic Highfield, Inc., the non-profit corporation that still runs the facility.



Many years of legal disputes followed as Historic Highfield tried to stave off demolition and gain control of the building from its nonprofit owners. Volunteers cleared the lawn, boarded windows, and tried to ward off further decay and vandalism. They raised money and worked to convince residents that Highfield Hall was worth saving. Eventually, collaborating with Selectmen, Historic Highfield was able to convince the town that Highfield Hall was important to the community and extraordinary measures were warranted to save the property. In 2000, Town Meeting members authorized Falmouth Selectmen to take Highfield Hall and six acres by eminent domain, and in 2001 the Town signed a lease with Historic Highfield to renovate and operate Highfield Hall.

Costs to restore the house were initially estimated at \$1 million. As the work progressed costs estimates escalated to \$5 million. To date, a total of \$8 million has been spent on renovations, almost all of which was contributed by private individuals.

Restoration began in 2002. By September of 2006, the first floor of Highfield Hall was completed and the Grand Opening was celebrated. By April of 2007, the second and third floors had also been completed and Highfield Hall opened for its first full year of operations. The fall of 2007 brought the completion of a new parking area and path system. The restoration of the landscape and gardens is the final renovation challenge, which is now well underway.

## Facilities and Capacity

Highfield Hall is owned by the Town of Falmouth and is operated by Historic Highfield; the 501c3 Corporation that formed in the early 1990's to save the estate. To amortize the \$400,000 debt Falmouth paid to acquire the house, Historic Highfield Inc. is paying the town \$45,000 a year for 10 years, until 2016. After 2016, the rent will be reduced to \$1 a year.

Highfield Hall has a total of 16,000 sq. ft. The house can accommodate up to 100 guests for a sit-down dinner or standing receptions for up to 175 guests.. Larger gatherings are held in tents. There is a 4000 sq. ft. concrete pad in the courtyard on the east side of the house that is used as a surface for tents. Tent rental is not included with facility rental and must be arranged through an approved vendor.

The maximum capacity for tented and for outdoor events is 200 people, due to constraints on parking. There are 70 spaces and the town requires 1 space for every 3 people. On the first floor, there are four rooms ranging in size from 300 to 720 sq. ft. Also on the ground floor is a large kitchen suite with about 500 sq. ft.; this is used for both event catering and cooking classes. It can accommodate up to 20 students for cooking classes. There are ladies and men's rooms of about 250 sq. ft. each; both have 3 toilets.

Highfield Hall hosts 20 to 22 weddings a year. About 75% of these are tented. Sometimes, two weddings per weekend are scheduled. Indoor space is used for 40-50 non-wedding events including corporate meetings, anniversary & birthday parties, and bridal showers. The house is minimally furnished with oriental carpets and antique pieces. Caterers supply all tables, chairs, crockery, and cutlery required for events.

The second floor has a Bridal Suite for dressing, which, along with the first floor, is included in the rental price for weddings. Also on the second and third floors are 6 rooms with 2150 sq. feet which are leased to four (for-profit) tenants who pay about \$2 sq. ft. for elegant office space. Tenants are for-profit organizations including an Architect, a Financial Planner, and a Therapist.

## Private Events

Last year, Highfield Hall hosted 22 weddings. During the height of the season, the facility often books two weddings a weekend. For private events, rents range from \$1500 for Fridays, Sundays, and Holidays during the low season up to \$4000 for Saturdays during the high season. Non-profits can use the facility for \$1,000 any time of year.

### WEDDING/FUNCTION RENTAL FEES AT HIGHFIELD HALL

Season	Saturday Rentals	Friday, Sunday and Holidays	Non-Profit Functions
May-October	\$ 4,000	\$ 2,800	\$ 1,000
November-April	\$ 2,800	\$ 1,500	\$ 1,500

*\*From May-October, Non-Profit functions are restricted to Fridays and Sundays.*

All-day rental of the entire house for weddings and large non-profit events and fundraisers includes use of the ground floor and the upstairs bridal suite for dressing and makeup.

Highfield Hall hosts 40 to 50 non-wedding corporate meetings and private parties a year. Charges for smaller private events ranges range from \$25 to \$500, depending on the number of rooms required and the amount of rental time. Hourly rental fees for Meeting/Conference Rooms are shown below.

### RENTAL FEES FOR MEETING/CONFERENCE ROOMS

	Non-Profit Organizations	Other Groups
May-Oct	\$25/hr.	\$50/hr.
Nov-April	\$45/hr.	\$70/hr.

Functions held after 5 pm require an additional \$20 per hour staff charge. Falmouth-based non-profits can use a meeting room free of charge once a year. There are 45 non-profits registered in Falmouth.

In 2010, annual revenues from Weddings & Private Events totaled \$85,225, averaging over \$4000 a week during the 21-week high season. According to the facility's Director, weddings are very profitable, producing an 80% to 85% return on investment. Smaller events for which hourly charges apply are a net drain on revenues; they require more in staff time than they produce in revenues. The facility is considering eliminating (non-wedding) private events in order to save on administrative costs and increase profitability.

## Programs

Highfield's programs are critical to its community involvement mission and fundraising goals. They include:

- Art Exhibits
- Concerts
- Fundraisers
- Lectures
- Walks & Talks
- Cooking & Culinary Classes
- Adult Classes
- Children's Programs
- 

## Art Exhibits

Highfield Hall is open to the public from 9 am to 5pm from April to October. Art exhibits are the major draw for visitors, who pay a \$5 admission charge. In addition, the facility gets 30% of all art sales. Daily admissions produced \$8206 in 2011. Gallery art sales raised an additional \$5433. Exhibits feature the work of local artists and school children. The Hall's upcoming art exhibitions for the 2012 season are shown below.

## UPCOMING ART EXHIBITIONS AT HIGHFIELD HALL

Date	Exhibit
April 1-29	Contemporary Quilts of Pat Pauly
May 2-June 3	Printmakers of Cape Cod
May 2- May 23	Falmouth High School Senior Class Artwork
May 27-June 24	Kevin King Retrospective
June 6-July 22	Photography: Writing with Light
July 25 - Sept. 23	Fresh Air: Cape Cod Plein Air Painters
Aug 1 - Sept. 16	The Art of Letters
Sept 18-Oct. 13	The Intimate Woods: Cape Cod Fiber Artists

## Music Concerts

A series of concerts are held each year as part of the “Music at the Mansion” series. Three concerts are scheduled for the 2012 season. Admission is \$20.

## Fundraising Events

Fundraising, including events, donations, and memberships, account for over 50% of Highfield Hall’s total revenues. Funding events scheduled for the 2012 include:



## UPCOMING FUNDRAISING EVENTS AT HIGHFIELD HALL

Date	Event	Admission
March 16	Voice Recital with Mather Astone, Baritone	\$5 Admission & Donations
April 1	2012 Season Opening Reception	\$5 Admission & Donations
July 20	Falmouth Architectural House Tour	\$75
July 29	Bluegrass on the Lawn	Donations
Dec. 8	Holiday Ball	\$125

This year, Highfield Hall has started a somewhat-controversial membership program to augment fundraising revenues. Members get free admission to the house and art exhibits and get discounts on program and event fees. Memberships for 2012 are:

### HIGHFIELD HALL MEMBERSHIPS

Student	\$20
Individual	\$40
Family	\$60
Business	\$100

The goal for 2012 is 500 to 600 members are expected to contribute \$24,000 to annual revenues.





## Culinary Program

Cooking classes at Highfield Hall are probably the most popular events hosted. Classes are held in the Mansion's 500 sq. ft. state-of-the-art kitchen suite. Class size is limited to 15 students. Classes are held on Monday and Wednesday afternoon. Fifteen classes are scheduled for the upcoming season including:

## Children's Classes

Highfield Hall has twenty-two classes for children scheduled for the upcoming season. Most children's programs are targeted at young children under 6 years old. An art class caters to special needs children. Programs are held in the large, airy children's playroom, which has direct access to the 400 acre town-owned Beebe Woods.

### UPCOMING CULINARY CLASSES AT HIGHFIELD HALL

Day	Date	Class	Fee
Sunday	March 25	Meet the Chefs: Tim Miller of the Glass Onion	\$39
Wednesday	April 4	Reasons to Roast: Lamb and its Leftovers	\$39
Monday	April 16	Artisan Bread 102: Beyond the Basics	\$39
Wednesday	April 25	Better Choices, Better Living - Delicious, Nutritious Food	\$39
Thursday	May 2	Reasons to Roast: Ham & its Endless Incarnations	\$39
Monday	May 21	Baking Brioche	\$39
Wednesday	May 30	Go Mediterranean	\$39
Wednesday	June 14	Reasons to Roast: Chicken	\$39
Monday	June 18	Any Night's Pizza Night	\$39
Wednesday	June 27	Savor the Flavors of India	\$39
Wednesday	July 16	Reasons to Roast: Seafood and its Surprising Versatility	\$39
Monday	July 16	Bread Basics 101: Create a Rustic Loaf	\$39
Monday	Aug 20	Artisan Bread 102: Beyond the Basics	\$39
Monday	Sept 17	Baking Brioche	\$39

Last year, culinary programs revenues totaled \$13,000 against expenses of \$9280 –a net profit of \$3720. About half of cooking classes sell out.

### UPCOMING CHILDREN'S PROGRAMS AT HIGHFIELD HALL

No. of Sessions	Date	Class	Age Group	Fee
5	Wednesdays in April & May	Creative Movement	1-5	Free
5	Thursdays in April 7 May	Beebe Woods Explorers	2-5	\$200
6	Fridays in June & July	Art Explorations for Special Needs	4-12	\$125
6	July	Summer Discovery Days	4-6	\$210

*\*Fees are for multiple sessions*

## Adult Programs

Highfield Hall's classes for adults include lessons in Chinese Mahjong, improvisational quilting techniques, and nutrition wellness programs for women. The bulk of adult classes, however, are workshops in mosaic-making. The Hall has become somewhat of a center of excellence in mosaic instruction on the Cape. These are run by a local artist who manages all of the publicity and registrations and pays the Hall a fee per person. A dozen sessions are scheduled for the spring/summer season offering instruction in specialized mosaic-making techniques.



## Cost & Revenues from Public Events & Programs

The table below compares costs and revenues for Public Events & Programs in 2011. These data exclude private events like weddings and parties. Costs don't include overheads for staff and operating costs of the facility.

Two-thirds of revenues and 70% of profits are generated by large public events, such as holiday events and road races. On a percentage basis, concerts are the most profitable events, while, of the programs, the adult culinary classes are the most lucrative.

### FINANCIAL PERFORMANCE OF EVENTS AND PROGRAMS AT HIGHFIELD HALL FY 2011

Events	Revenues	Expenses	Profit
Hounds at Highfield	\$ 4,289	\$ 500	\$ 3,789
Glories of the Garden	\$ 31,114	\$ 20,622	\$ 10,492
Falmouth Road Race	\$ 24,250	\$ 2,712	\$ 21,538
Holiday Ball	\$ 32,350	\$ 18,179	\$ 14,171
Holidays at Highfield	\$ 14,269	\$ 3,450	\$ 10,819
<i>Subtotal Events</i>	<i>\$ 106,272</i>	<i>\$ 45,463</i>	<i>\$ 60,810</i>
<b>Concerts</b>			
Music at the Mansion	\$ 16,785	\$ 7,111	\$ 9,674
Simon Concerts	\$ 7,582	\$ 1,497	\$ 6,086
<i>Subtotal Concerts</i>	<i>\$ 24,367</i>	<i>\$ 8,608</i>	<i>\$ 15,759</i>
<b>Art</b>			
Gallery Art Sales	\$ 5,433	\$ 1,936	\$ 3,497
<b>Programs</b>			
Adult Culinary Programs	\$ 12,938	\$ 9,281	\$ 3,657
Kids Culinary Programs	\$ 1,120	\$ 909	\$ 211
Kids Summer Cooking/Gardening	\$ 5,130	\$ 3,565	\$ 1,565
Book Promotions	\$ 490	\$ 203	\$ 287
Murder at the Mansion	\$ 3,885	\$ 3,435	\$ 450
Other Programs	\$ 1,885	\$ 920	\$ 965
<i>Subtotal Other Programs</i>	<i>\$ 25,448</i>	<i>\$ 18,314</i>	<i>\$ 7,134</i>
<b>Total Costs / Revenues / Profits</b>	<b>\$ 161,521</b>	<b>\$ 74,321</b>	<b>\$ 87,200</b>

## Staff

Staff salaries and benefits are, by far, the facilities biggest expense, totaling \$271,175 in 2010, one-third of total expenses. There are three full-time positions – an Executive Director, who is paid about \$61,000 a year; a Deputy Director, who handles ticket sales for programs and events; and a Maintenance Director. There are six part-time positions including a Weddings & Private Events Manager, an Education Coordinator, a Development Manager, a Culinary Coordinator, a Music Director, and a Financial

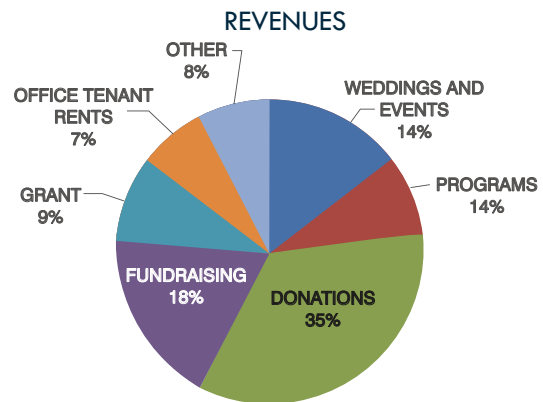
Controller. Two additional part-time administrative assistants are paid by the hour.

Some 150 volunteers provide additional staff support for Highfield Hall. Volunteers are involved in virtually all aspects of operations including fundraising, event planning, researchers, painters & furniture refinishers, culinary teachers and assistants, and greeters for visitors to the Hall. All gardening is done by volunteers.



## Financial Performance

The table and chart below show the annual financial report for Highfield Hall for the Fiscal Year ending May 31, 2010. The facility had a net operating loss of just over \$244,000. However, most of this loss – some \$225,000 -- is due to depreciation and rent paid in advance to the Town. On a cash basis, the facility had a profit of over \$20,000 in Fiscal Year 2010.

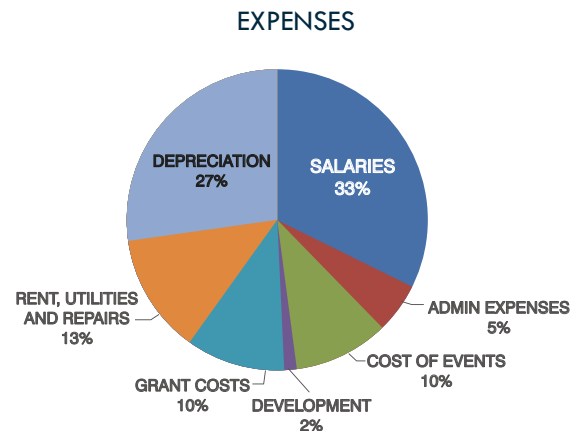


### HIGHFIELD HALL FINANCIAL REPORT FY 2010

Revenues		Expenses	
Weddings & Functions	\$ 84,225	Salaries	\$ 271,175
Programs	\$ 51,363	Admin. Expenses	\$ 44,161
Donations	\$ 205,361	Cost of Events	\$ 84,318
Fundraising	\$ 107,443	Development	\$ 12,563
Grant	\$ 52,916	Grant Costs	\$ 86,150
Office Tenant Rents	\$ 41,700	Rent, Utilities, & Repairs	\$ 108,765
Other	\$ 44,994	Depreciation	\$ 224,886
	\$ 588,002		\$ 832,018
<b>Net Income from Operations</b>			<b>\$ 224,886</b>

Revenues from Weddings & Functions and programs totaled \$132,800 – 23% of the Hall's total revenues. Direct expenses for events and programs were \$84,320, producing a net profit of \$51,270—a return of over 60% (not including administrative or fixed operating costs). Income from fundraising events and donations accounts for an additional 53% of Highfield Hall's revenues. A \$53,000 grant from the Institute of Museum and Library Services (IMLS) made up another 9% of revenues. (For the current fiscal year, Highfield Hall received a \$76,000 IMLS grant.)

Salaries and benefits of \$271,175 accounted for 33% of expenses in 2010. Depreciation, a paper loss for tax purposes, accounted for the next-largest share. Facility costs – including rent, utilities, and maintenance --comprise 13% of total costs. The table below shows a detailed breakdown of expenses for the facility. These amount are different than those shown above, since the latter are for FY 2010 (June to May), while the former are based on CY 2010



DETAILED EXPENSES BREAKDOWN  
2010

<b>Staff</b>	
Salaries	\$ 220,871
Benefits	\$ 40,019
Payroll Taxes	\$ 17,477
<b>Professional Services</b>	
Legal	\$ 8,715
Accounting	\$ 6,525
Investment Mgt.	\$ 11,876
Advertising	\$ 4,599
Office Expenses	\$ 14,085
Other	\$ 17,733
<b>Building Costs</b>	
Occupancy	\$ 129,133
Insurance	\$ 18,758
Utilities	\$ 20,556
Depreciation	\$ 203,723
<b>Other Costs</b>	
Catering & Liquor	\$ 19,568
Fundraising	\$ 16,113
Printing & Design	\$ 15,490
Supplies	\$ 14,570
Other	\$ 89,040
<b>Total 2010 Expenses</b>	<b>\$ 868,851</b>

The table below breaks out building and grounds costs for 2011. It shows that maintenance, utilities, and insurance totaled over \$75,000. This averaged \$4.44 per sq. ft. for the 17000 sq. ft. facility. Applying this to Emery's 4,250 sq. ft. would mean that facility operating Expenses at Emery Estate might be in the range of \$18,000 to \$20,000.

DETAILED EXPENSES BREAKDOWN  
2011

Maintenance (Bldg & Grounds)	\$ 28,336.12
Utilities	\$ 24,183.19
Insurance	\$ 22,947.00
<b>Total 2011 Facility Costs</b>	<b>\$ 75,466.31</b>
Size of House (sq. ft.)	\$ 17,000
Cost per sq. ft.	\$ 4.44
<b>Possible Annual Facility Costs for Emery Estate</b>	<b>\$ 18,867</b>

## Lessons for Emery Estate

Highfield Hall provides a nearly-ideal model of a community-oriented function venue with facilities for weddings and private events and an eclectic range of programs for all age groups within the community. It has an energetic, professional management that raises over half of the facility's \$588,000 annual revenues from donations and events. In addition, Historic Highfield Inc. has over \$300,000 in annual investment income from endowments and bequests that can be used to subsidize operating deficits. The ability to raise this level of annual and endowment funding is due to its status as a resort community for a large wealthy seasonal population. These are fundamental differences which point out that Highfield Hall is not a direct comparable for Emery Estate, but the Highfield model is useful as a basis for developing pro-forma assumptions tailored to Emery Estate's unique situation and the demographics of the supporting community.

# Literature Review & Case Study for a Community Supported Agriculture (CSA) Farm

## Literature Review

This section reviews the substantial body of literature on CSA experience that has been developed over the past two decades. The following topics are reviewed:

- Steps to create a CSA
- Nurturing a Core Group to run the CSA
- Start-Up and Operating Budgets
- Typical CSA Share Composition
- Calculating Share Prices
- Obtaining Organic Certification

Following the literature review, a case study of Newton Community CSA farm is presented.

## The CSA Vision

The ideal CSA is a smoothly-functioning organic farm that divides up its produce among a committed group of supporters who share the risks and benefits of the enterprise with the farmer. With a market assured and income guaranteed, the farmer can concentrate on producing high-quality food and practicing careful stewardship of the land. The members get to eat the freshest, tastiest, most nutritious food they have ever experienced, as though they were master gardeners, but with much less work. They and their children, learn fascinating lessons about food production and, by eating seasonally, make a deep connection to a very special piece of land. They respect and honor the farmer's skills and express their appreciation by friendship, financial support, and volunteering to help on the farm.

## Steps to forming a CSA

Whether consumer or farmer-initiated, the steps needed to form a CSA are similar. First, the initiators (in this case the Emery Estate Advisory Committee) issue a call to form a CSA. Members can be recruited among friends, neighbors, and existing community groups like day care center, churches, civic groups, schools, and workplaces. Next, an exploratory meeting of prospective sharers and farmers is held to discuss the goals of the CSA and to assess the level of commitment of participants to the CSA. If interest is high enough, a founding core group should be created to implement the CSA.

At the initial or at a subsequent meeting, the group must agree on its core values and decide such issues as:

- Does the group want organic food?
- What are the educational goals for the CSA? Is it important to involve children?
- Will all members be required to contribute work, or can some buy out by paying higher fees?
- Are members willing to share production risks with the farmer?
- What commodities does the community want from the farm?
- What level of share prices will the local market support?

Following resolution of these issues, a core group should be organized to oversee the process of recruiting and hiring a farmer. Probably the best local recruitment network is the EMass Craft mailing list, where farmers in Eastern Mass exchange ideas and advice. The group should also:

- Decide how and when the food will be distributed
- Divide up member responsibilities
- Approve the budget proposed by the farmer
- Set a goal for the number of shares to be sold during the initial years of operation
- Set fee policy and payment schedule
- Clarify expectations as to variety and quantity of food included in each share
- Decide who owns any equipment purchased

The core group then must recruit members for the first season. This can be done by a combination of posting and mailing flyers, press releases, and social networking, like developing a Facebook site to recruit members.

The legal structure of the CSA needs to be established. Many groups defer decisions on legal structure for a season or two. Options for legal structure include

- Consumer cooperative
- Sole proprietorship or partnership of farmer
- Corporation or limited liability company
- Nonprofit corporation
- Farmer-owned coop

It is necessary to determine how start-up costs will be capitalized. Many CSA's start with a minimum of rented or borrowed equipment. For the longer term, decisions must be made on purchase and maintenance. Options include:

- > The town capitalizes
- > The farmer capitalizes
- > Members capitalize through fees
- > The group seeks grants
- > The group seeks loans
- > The group raises funds.

## Core Group Duties

For Community Supported Agriculture to be more than just another direct marketing scheme, the growers and the members need to work together to build an institution they can share. A consumer-initiated CSA, like Emery CSA, the hired growers must feel they are more than temporary employees who serve at the will of a Board of Directors that may not understand a great deal about food production. This requires a strong grower-member council to run the CSA.

Regardless of its legal structure, a CSA is, in essence, a member-farmer cooperative. As a cooperative, a CSA is a hybrid enterprise blending farmer and member control. The core group must select the farmer, determine the crops desired, set fee policy and payment policy, and establish the policy on member participation in farm labor. The group also sets distribution places and procedures and monitors the implementation of the project. Specific jobs should be assigned to core group members. Jobs that need to be covered include:

**Treasurers**, who will:

- Collect fees
- Pay farmers
- Keep books
- Maintain bank account

**Recruitment Coordinators**, who will:

- Design and distribute web and print materials to recruit new members
- Generate press releases and publicity
- Link with other CSA's in the region

**Communications Coordinators**, who will:

- Maintain membership lists
- Maintain website & newsletters
- Answer phone & web inquiries

**Schedulers**, who will:

- Schedule volunteers for farm work and distribution of produce

**Distribution Organizers**, who will:

- Manage and staff distribution site
- Organize bulk orders from other farms (when bringing in produce from local farms)

**Social/Educational Directors**, who will:

- Organize and promote group activities (picnics, dinners, harvest and holiday celebrations)
- Develop and oversee educational programs
- Create play area for children on the farm
- Set guidelines for parents and clear rules for children

Note: These jobs can be combined in any number of ways, depending on the talents and energies of farmers & shareholders.

## Farmers Duties

Having a core group that is responsible for the non-farming tasks needed to run a successful CSA leaves the farmer free to accomplish farm tasks. These include:

- Developing the farm budget for approval by the core group
- Prepare field plans
- Soil preparation
- Seed selection
- Planting
- Cultivation
- Harvesting
- Repair and maintenance of tools and buildings
- Farm supplies (fertilizers, pesticides, seeds, fuels, packaging)
- Pay insurance and taxes
- Bookkeeping
  - > Financial
  - > Production
  - > Certifications
- Train and oversee sharers in farm work

## Start-Up Expenses

The biggest start-up expense for most aspiring CSA's is land acquisition, particularly in the Boston area where land prices are so high. The Town of Weymouth is fortunate to own the Emery Estate land. This is the major obstacle for most new CSA's. Non-real estate start-up costs can range from under \$10,000 for a 1.5 acre farm up to \$48,000 for a 5-acre farm. Table 1 includes a list of sample start-up Equipment for a 1.5 acre market farm. This assumes that used equipment will be purchased, which means that the farmer selected should have enough basic mechanical skills to make machine repairs. Start-up costs including a hoophouse and a used tractor and walk-in cooler are estimated at \$9,000.

**TABLE 1: SAMPLE EQUIPMENT LIST FOR 1.5 ACRE MARKET FARM**

Hoophouse and related supplies	\$ 2,325
Walk-behind tractor w/ rotavator [used]	\$ 3,700
Mower [used]	\$ 350
Walk-In cooler [used]	\$ 1,255
Garden cart	\$ 475
Misc. tools, crates, and irrigation lines	\$ 1,025
<b>Totals</b>	<b>\$ 9,100</b>

Source: John Hendrickson, *Farmer to Farmer*, 2005. 2003 prices updated for 2012 prices based on synthesis of CPI +20% and advice from CSA farmers.

For a larger 5-acre farm, start-up costs can range up to around \$50,000 with the purchase of tractors and vehicles, implements and hand tools, irrigation equipment, a larger hoop house, and a greenhouse with heater, as is shown in Table 2.

**TABLE 2: SAMPLE EQUIPMENT LIST FOR 1.5 ACRE MARKET FARM**

<b>Tractors and Vehicles</b>	
35 hp tractor w/ loader	\$ 11,625
All-terrain vehicle	\$ 3,425
Pickup truck	\$ 7,525
<b>Implements</b>	
3 pt rotary mower	\$ 1,350
3pt tiller	\$ 1,925
3 pt digger (filed Cultivator)	\$ 350
3-t chisel plow	\$ 350
3 pt till bar & clamps	\$ 200
3 pt sprayer	\$ 1,025
6 ft grain drill	\$ 75
Manure Spreader	\$ 75
4x6 trailer	\$ 650
Lely spring time cultivator	\$ 1,925
Bedding (mulch) chopper	\$ 475
<b>Irrigation</b>	
5.5 horsepower pump	\$ 750
Lay flat hose (ca. 3000 ft.)	\$ 1,375
Sprinkler heads and couplers	\$ 675
<b>Greenhouse</b>	
1000 sq. ft. Greenhouse	\$ 6,150
Benches	\$ 275
Heater	\$ 900
16 x 96 hoop house	\$ 1,900
<b>Hand tools, harvesting</b>	
Planet Jr. seeder	\$ 350
Misc. tools	\$ 675
Misc. tools	\$ 2,050
Printer	\$ 325
50 Harvest Tubs	\$ 825
Saw Horses	\$ 150
Wash Tubs	\$ 400
Pressure Washer	\$ 675
<b>Total</b>	<b>\$ 48,450</b>

Source: Henderson & Van En, *Sharing the Harvest*, 2007. 2003 prices updated for 2012 prices based on synthesis of CPI +20% and advice from CSA farmers.

## Annual Revenue Streams

Table 3 shows the annual sales of an actual 1.5 acre CSA farm. The farm's 45 shares produce an annual income stream of just under \$20,000. Wholesale sales to restaurants totaled \$13,500 of the farm's total income of \$33,225. The farm's biggest expense was hired labor accounted for about 35% of the farm's expenses. The farmer's net income totaled \$16,750, making the small CSA farm a rather marginal enterprise.

**TABLE 3: ANNUAL SALES AND EXPENSES  
1.5-ACRE CSA FARM**

<b>Gross sales</b>	
CSA (45 members)	\$ 19,725
Direct wholesale	\$ 13,500
<b>Total sales</b>	<b>\$ 33,225</b>
<b>Annual cash expenses</b>	
Bank service charges	\$ 75
Hired labor	\$ 6,025
CSA crops purchased	\$ 400
Fuel-for equipment (tiller, mower, vehicle)	\$ 275
Propane for greenhouse	\$ 450
Greenhouse supplies	\$ 800
Insurance	\$ 425
Memberships/dues	\$ 175
Miscellaneous	\$ 400
Organic certification	\$ 700
Postage, printing, and reproduction	\$ 225
Repairs	\$ 800
Seed	\$ 1,125
Soil amendments	\$ 725
Supplies	\$ 2,050
Taxes	\$ 550
Telephone and utilities	\$ 1,275
<b>Total expenses</b>	<b>\$ 16,475</b>
<b>Net cash income</b>	<b>\$ 16,750</b>

Source: John Hendrickson, *Farmer to Farmer*, 2005. 2003 prices updated for 2012 prices based on synthesis of CPI and advice from CSA farmers.

Table 4 shows the income and expenses of a larger 4.5 acre CSA farm. Gross sales from shares, restaurant sales, and farm stand sales total \$63,550. After deducting expenses of just over \$35,000, the farmer's net revenues come to nearly \$29,500, making this a more viable enterprise for a farmer. This shows that farms with greater economies of scale produce more viable revenue streams for the farmer.



TABLE 4: ANNUAL SALES AND EXPENSES  
4.5 ACRE CSA FARM

<b>Gross sales</b>	<b>\$ 63,550</b>
<b>Cash expenses</b>	
Hired labor	\$ 6,925
Seeds	\$ 4,600
Property taxes	\$ 3,500
Fertilizer	\$ 3,025
Services	\$ 2,750
Fuel	\$ 2,700
Farm and vehicle insurance	\$ 2,350
Greenhouse supplies	\$ 1,775
Maintenance	\$ 1,750
Phone	\$ 900
Electricity	\$ 850
Small tools and misc. supplies	\$ 800
Communications (printing, copying)	\$ 725
CSA supplies	\$ 600
Employment taxes	\$ 350
Bags	\$ 300
Office supplies	\$ 175
<b>Total cash expenses</b>	<b>\$ 34,075</b>
<b>Net cash income</b>	<b>\$ 29,475</b>

Source: John Hendrickson, *Grower to Grower*. 2012 dollars 2003 prices converted to 2012 dollars using a combination of CPI and advice from CSA farmers.

## CSA Share Composition

A typical CSA share receives a variety of organic salad greens, spinach, beans, beets, Kohlrabi, tomatoes, potatoes, cabbages, carrots, onions, radishes, broccoli, peppers, melons, cantaloupe, cucumbers, summer and winter squashes, sweet corn, pumpkins and zucchini. Table 5 shows the contents of a seasonal share of 55 different vegetables grown by Willow Pond CSA farm in Brentwood, NH, where seasonal shares total 418 pounds of produce – about 20 pounds per week. If, however, the growing season is not favorable, shareholders, like stockholders, must accept smaller share sizes.

TABLE 5: TYPICAL CSA SEASONAL SHARE  
WILLOW POND FARM, NH

<b>Crop</b>	<b>Lbs. per season</b>
Apples	10
Asparagus	2
Basil	2
Beans	22
Beets & greens	15
Broccoli	10

TABLE 5: TYPICAL CSA SEASONAL SHARE Cont.  
WILLOW POND FARM, NH

<b>Crop</b>	<b>Lbs. per season</b>
Brussels Sprouts	2
Cabbage	15
Celeriac	0.5
Chinese cabbage	4
Carrots	30
Cauliflower	5
Cucumber	15
Daikon radish	2
Eggplant	3
Flowers	Pick your own
Garlic	0.25
Herbs	Pick your own
Kale	2
Kohlrabi	2
Leeks	1
Lettuce	20
Melon	20
Onions	15
Parsley	1
Parsnips	1
Peas	5
Snap peas	2
Snow peas	2
Peppers	3
Potatoes	50
Pumpkin	25
Radish	5
Rhubarb	2.5
Rutabaga	10
Scallion	4
Spinach	2
Winter squash	25
Summer squash	20
Swiss chard	5
Tomatoes	40
Turnip	4
Watermelon	4
Zucchini	20
Total Pounds per season	418.25
Avg. Value per pound	\$1.50
<b>Price per share</b>	<b>\$625.00</b>
<b>Avg. Pounds per week</b>	<b>20</b>

Sources: Henderson & Van En, *Sharing the Harvest*, 2007. Price assumptions developed by Cambridge Economic Research

## Calculating the Share Price

How to set a fair price for shares is one of the most difficult questions for CSA farmers. Many CSA's divide total expenses (including the farmer's salary) by total number of shares to determine the share price. Some CSA's divide shares into various sizes or quantities, such as a full and half-shares, single-person shares, barter shares, gourmet shares, macrobiotic shares, fruit shares, and flower shares. The price of a half share is usually more than 50% of that of a full share because of the additional administrative and manual work involved in bookkeeping and distribution.

Farms that sell to other markets (like restaurants and farm stands) tend to calculate the share price based on the market value of the produce. Newton Community Farm and Drumlin Farm in the Boston suburbs set market values based on those charged by Whole Foods and at Farmer's Markets. Subscription plans often charge a fee based on what the market will bear. Some farms set their price based on the average weight of the produced they will give each week. They determine the average value of the produce per pound times the number of pounds that they expect to provide each season. For example, if the 418 pounds per share produced by Willow Pond Farm (see Table 5) were valued at \$1.50 per pound, CSA shares would come to about \$625 per share, which is typical for the New England region.

## Organic Certification

The National Organic Standards require that any grower or livestock producer that markets their products as organic must be certified by the USDA National Organic Program. This process can take 8 to 12 weeks or longer. It requires from 16 to 24 hours of paperwork from the farmer. There is a one-time certification fee of \$150 and an annual certification fee charged on a sliding scale depending on the gross sales of the farm. For the 1.5 acre farm in Table 3 with sales of \$33,225, the annual fee would be \$685. Of this fee, 75% is refundable by Mass. Dept. of Agricultural Resources (MDAR), up to \$750, so the farm would need to pay just \$171 to maintain annual USDA organic certification. For the 4.5 acre farm presented in Table 4, the annual fee would be \$895. The 75% MDAR refund would reduce this to \$225 a year.

Since organic produce is 35% to 85% more valuable than non-organic and the fee to maintain certification is relatively modest (due to the MDAR subsidy) it is probably worthwhile to seek organic certification for Weymouth CSA. This issue should be probed with prospective farmers during the recruitment and selection process.

# Newton Community Farm CSA Case Study

Newton Community Farm is an 88-member CSA on the historic Angino Farm, comprised of a single acre of land in Newton, MA. The farm was established in 2006, when the Newton Conservators -- a land trust -- encouraged the City of Newton to use Community Preservation Funds to buy the property, which has been farmed for over 300 years. Although the rule of thumb is 20 CSA members per acre, the farm more than quadruples this by intensive-farming methods, careful choice of crops, and by using a walk-behind tractor.

The Mission of the Farm is to nurture a community that teaches and models sustainable agricultural and environmental practices. The farm is run by Newton Community Farm Inc., a non-profit agency with eight board members who commit time to the vital fundraising, communications, administrative, and education tasks that are needed for the CSA to achieve its mission in the community.

At present, the farm is co-managed on an interim basis by Megan Tilley and her partner Josh Faller. They are filling in for the regular farmer, who is on sabbatical for a year with his family. There are two management positions; a farm manager and an assistant (see Payroll section for salary information). The farmers live in the on-site, four-bedroom house, which is part of the compensation.

The farm's Education Director works 20 hours a week, designing educational programs and recruiting volunteer teachers and participants. The CSA is now recruiting a part-time administrative assistant to work 15 hours a week, assisting with events, volunteer coordination, and fundraising mailings. A Farm Stand Worker along with a Volunteer Intern will be recruited to help the farmers during the growing season.

## Delegation of CSA Responsibilities

The farmers manage farm operations and jobs, while the non-profit's board has assumed responsibility for oversight of administration, finance, communications, fundraising, and educational programs, and physical improvements. Board members fill in on the following committees:

- Education Committee - Works closely with the Educational Director to design appropriate classes for all age groups in the community
- Events and Outreach Committee – Oversees the six major annual events designed to foster community involvement in the far.
- Preservation and Buildings Committee – Oversees maintenance and improvements to structures on the property
- Communications Committee - Helps with updates to the farm's Facebook page, website, Twitter account, blogs, signs, and press releases.
- Fundraising Committee – Plans fundraising events.



## Membership

The CSA has 80 full shares, but most of these have been purchased as half-shares. There are 47 full shares and 94 half-shares. Weekly pick-up shares are \$570 for the 21-week season. Shareholders come to the farm once a week to pick up vegetables. Shares include some pick-your-own crops such as peas, beans, cherry tomatoes, and herbs. Share size varies throughout the season. Smaller households and single people can buy half-shares for \$300, which are picked up every other week.

The CSA also offers fruit shares in conjunction with Autumn Hills Orchard in Groton. Fruit shares cost \$70 and run for 9 weeks from the last week in August until the end of October. Each fruit share consists of a 5 pound bag of apples and may include pears, plums, grapes, or peaches. As with all things agricultural, what is available is highly dependent on the particular growing conditions of each season. The CSA sells 39 to 40 fruit shares a season. They also offer flower shares in conjunction with Natick Community Farm.

Shareholders come to the farm once a week to pick up vegetables. Shares include some pick-your-own crops such as peas, beans, cherry tomatoes, and herbs. Share size varies throughout the season. CSA pick-ups take place at the farm on Wednesdays and Thursdays from 2-7 pm. Members are required to work 12 hours a season on the farm. They can opt out of this by paying \$108 annually.



## Share Pricing

The CSA determines share prices according to what the market can bear. The market value for full CSA shares in Eastern Massachusetts is \$550 to \$650 a month. Newton's share price is \$575. In making up shares, the farmers consider the market value of the produce they are providing. A \$575 21-week share works out to be about \$28 a week. Early in the season, shares will be less valuable and lighter, being comprised mostly of greens. Later in the summer, when vegetables are available, shares are heavier and more valuable. Farmers check prices for the same items at Whole Foods & Farmer's Markets to determine the appropriate volume of produce that goes into each share. As is the practice at most CSA farms, Newton's farmers try to give shareholders about 10% more than market value, depending on the growing season.

## Share composition

Share size varies throughout the season. At the height of the season (Aug-Sept) a typical weekly share might include: 1 bunch roots crop (carrots or beets); 2 bunches of greens (changing selection); 1 bunch of herbs (basil, cilantro, dill, or parsley); 1 eggplant; 4 bell peppers; hot peppers; 3 pounds of potatoes; 2 summer squash or zucchini; 5 or more pounds of tomatoes; 1 pint cherry tomatoes; 8 ears of corn; 1 quart PYO beans; herbs (other than the bunched herbs listed above). Shares include some pick-your-own crops such as peas, beans, cherry tomatoes, and herbs.

### CROP LIST NEWTON CSA FARM

Arugula	Dill	Potatoes
Asian greens	Eggplant	Radishes
Basil	Garlic	Radishes, daikon
Beans, bush	Greens	Scallions
Beets, roots	Herbs	Spinach
Broccoli	Kale	Squash
Cabbage	Leeks	- Summer
Cabbage, Napa	Lettuce	- Winter
Cantaloupe	Japanese Greens	Turnips
Carrots	Mustard	Tomatoes
Cauliflower	Onions	- Slicing
Chard	Pac Choi	- Heirloom
Cilantro	Parsley	- Paste
Collards	Peas	- Cherry
Cucumbers	Peppers	Watermelon

## Education

A part-time Farm Educator/Coordinator was created last year. She reports to the Board's Education Committee. The Education Committee's goal is to offer programming encompassing the full spectrum of food production including soils, plants, shrubs, and trees. Programs also cover composing, cooking, and food processing. They seek to enable Newton citizens of all ages to learn sustainable gardening, to create a variety of items from the fruits of their own labor, and to reconnect with their natural environment.

The farm is dedicated to providing the community with an authentic farm experience and an opportunity to learn sustainable growing methods. As a fully operating and working farm, they are an ideal platform for teaching the entire food chain, from pre-seed to post-harvest to food processing and preservation.

Programs for all ages and skill levels are offered, including:

- **Classes and Workshops:** Children and adults get hands-on training in sustainable growing and food processing, skills that they can apply at home.
- **Summer Programming:** Elementary and middle school students are trained in Food and Farming.
- **Farm Sprouts:** Story time and activities for young children every Tuesday from late June through July and August.
- **Learning Garden:** In the Learning Garden, students try out newly learned skills with the support of workshop facilitators.
- **School Outreach:** The farm is brought to schools with talks and projects in local public and private schools.

## 2012 EDUCATIONAL PROGRAMS NEWTON CSA FARM

Date	Class	Member Cost	Non-Member Cost
March 10 & 17	Growing Fruit Trees in Newton	\$54	\$60
March 25	Vermicomposting for Beginners	\$35	\$40
March 31	Biointensive Four-Season Gardening	\$40	\$45
April 17	How to Build a Raised Bed	\$40	\$45
April – June (3 sessions)	Family Gardening Class	\$61	\$68
April 28	Backyard Chickens	\$20	\$25
May 3	Spring Vegetable Supper	\$20	\$25
May 15	Wine Tasting & Discussion Series	\$27	\$30
May 24	Container Gardening	\$32	\$35
June 9	Photography on the Farm	\$25	\$30
June 14	Jam & Jelly Making	\$23	\$26

### Events

The main objective of holding events at the farm is to foster community involvement. In 2012, six major events are planned to showcase the Farm and its produce. These events helped to raise \$36,000 last year. Events include:

- Seedling Sale, May 19 - The fourth annual will bring hundreds of home gardeners to the farm. A wide variety of vegetables and herbs are for sale. Last year, the Farm sold thousands of seedlings, raising \$15,500.
- Strawberry Solstice Social, Sunday June 24 – This brings new faces and young families to the farm.
- Evening on the Farm, Tuesday July 17 - Food, music, conversation on a summer evening.
- Fall Festival, Sunday September 23 - The Fall Festival, the farm's biggest annual event, attracts nearly 1,000 people who enjoy bluegrass music, food, children's activities, pumpkin decorating, and tours of the farm.
- Dinner at Lumiere Restaurant, October 21 - Elegant dinner featuring farm produce. This supports the farm's education programs and provides donations to the Newton Food Pantry.
- Halloween on the Farm, Friday October 26 - Children are invited to the farm's haunted barn for an afternoon of spooky stories, bobbing for apples, and pressing cider.

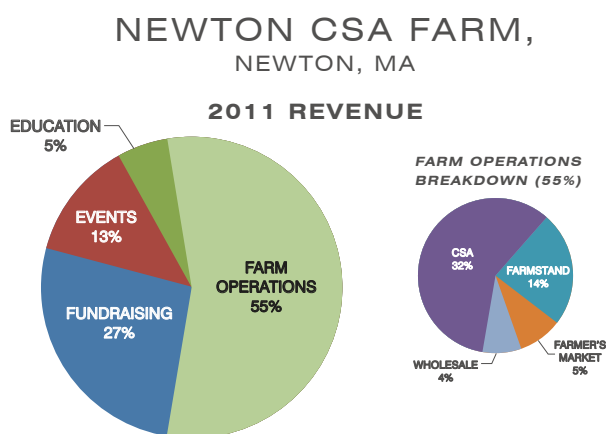
### Improvements

The farm installed a new hoophouse to extend the growing season through the winter months. This is a portable greenhouse-like structure of light weight plastic. Solar radiation warms plants, soil, and other things inside the building faster than heat can escape. The hoophouse was funded by covered by a grant from the Natural Resources Conservation Service.

In 2012, the farm is planning to renovate the barn with Community Preservation Act funds. The project will convert the main floor into handicapped-accessible community and workshop space with bathrooms and a demonstration kitchen. Last winter, the farm submitted a proposal to the City of Newton to expand onto a 0.5 acre site in Nahanton Park, 0.5 miles from the farm's present location.

### Financial Performance

In 2011, the farm's total revenues were \$153,700 against expenses of \$147,700 – a surplus of just under \$6000. After deducting the farm's (paper) \$17,840 depreciation loss, there was actually a net profit of around \$25,000, so the farm is better than revenue-neutral.



As is shown in the above chart, just over half of annual income is from Farm Operations. The next biggest source of income is fundraising, which accounts for another 27%. Events and Education make up the remaining shares. The smaller pie shows that just over half of Farm Operation income comes from CSA shares. Farm Stand income accounts for 15%. Sales to restaurants (wholesale) and at Newton Farmer's Markets account for 4% to 5% of total revenues.



The 2011 budget details, including revenues and expenses, are shown below:

**TABLE 6: 2011 BUDGET  
NEWTON CSA FARM**

<b>Farm Operations</b>	
CSA Shares	\$ 48,547
Farm Stand	\$ 21,399
Farmer's Market	\$ 6,891
Restaurant Sales	\$ 6,116
<b>Total Farm Operations Income</b>	<b>\$ 82,953</b>

**TABLE 7: 2011 BUDGET *Cont.*  
NEWTON CSA FARM**

<b>Non-Farm Income</b>	
Education Programs	\$ 8,037
Fundraising	\$ 41,657
Events	\$ 20,116
Interest	\$ 943
<b>Total Non-Farm Income</b>	<b>\$ 70,753</b>
<b>Total Income</b>	<b>\$153,706</b>

#### **Expenses**

Farm Operating Costs	\$ 27,547
Farm House & Outbuildings Maintenance	\$ 2,924
Depreciation	\$ 17,837
Utilities	\$ 6,990
Education Programs	\$ 1,548
Fundraising	\$ 9,719
Events	\$ 1,402
Administration	\$ 10,408
Payroll	\$ 69,361
<b>Total Expenses</b>	<b>\$147,736</b>

<b>Net Operating Income</b>	<b>\$ 5,970</b>
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Source: Newton Community Farm, 2012 Business Plan

Nearly half of the CSA's operating costs go to salaries for the two full time and various part-time and summer employees supported by the farm. As is shown in the table below, the principal farmer's salary is \$33,075, including rent-free accommodation in the farm house. In addition, they live in the farmhouse on the property rent-free. The full-time apprentice farmer is paid \$14,000, not including housing. Support staff includes part-time event and educational coordinators, farm stand and farmer's market hands, and office staff.

**TABLE 8: PAYROLL EXPENSES  
NEWTON CSA FARM**

Event Coordinator	\$ 2,160
Education Coordinator	\$ 12,645
Farmer	\$ 33,075
Apprentice Farmer	\$ 14,025
Farmer's Market	\$ 630
Workshare	\$ 570
Office Staff	\$ 1,367
Payroll Taxes	\$ 4,889
<b>Total Payroll Expenses</b>	<b>\$ 69,361</b>

Source: Newton Community Farm, 2012 Business Plan

Farm Operating expenses account for another one-fifth of the farm's expenses—about \$27,500 in 2011. This catch-all category includes all supplies, tools, repairs, and maintenance of equipment used to farm the land. It includes seeds, mulch, and vehicle expenses. The biggest Farm Operations expense is produce bought in from other local farms to fill out CSA Shares. The CSA spent just over \$12,000 on bought-in produce in 2011.

Non-farming expenses include farm house and barn maintenance costs, which totaled \$2,924. An additional \$10,400 was spent on administration. Utilities for the farm and the farmhouse came to just under \$7,000. Nearly equal amounts—about \$1,800—were spent on electric, gas, and telephone. The rest was spent on porta-potty rentals for events.

## **Conclusions**

Based on current knowledge of the historically-farmed Emery Estate, agricultural farming of a portion of the property is possible (soil tests will confirm the quality of the site). With the on-site facilities; house, barn, and corn crib, the use of the property for a typical CSA is feasible. A determination of local interest in purchasing shares of CSA produce, allowing educational and other farm-related programs, and committing a portion of the property and buildings to farming will provide the basis for a decision on this use.



# Codman Estate Carriage House Case Profile

Codman Estate Carriage House in Lincoln, MA provides a gracious country setting for private functions. The Codman Estate was occupied by the Codman Family for five generations. Reportedly called “the handsomest place in America,” this country estate was fashioned in the English manner. The 1740 Codman Estate main house is a museum featuring antique furniture and art. The grounds feature an Italianate garden with perennial beds, statuary, and a reflecting pool filled with water lilies. There is also a 1930’s-style English cottage garden. These are the common settings for wedding photos.



Carriage House & English Cottage Garden

Events are held not in the main house. The rustic, wood-paneled carriage house has been renovated specifically for functions. The carriage house, with 1260 sq. ft., accommodates 65-75 guests inside, and up to 130 guests with a tent. About 75% of summer weddings are tented events. There are 3 bathrooms and parking for 85 cars.

In the 1970’s the Codman Estate was donated as a bequest to Historic New England, a 501(c)3, non-profit organization devoted to preservation of historic estate properties. Historic New England is the oldest and largest regional heritage organization in the nation. The corporation owns and operates thirty-six historic sites in five states. Five of these, including Codman and Lyman Estate in the Boston area as well as estate properties in Connecticut, New Hampshire, and Maine, are rented out for functions.

## Events

As shown below, during the past several years, the Codman Estate Carriage House has hosted around 45 events, an average of about one per week. Events include seven private parties and 38 weddings. Of these events, 80% are held during the April to October high season. One of the most attractive features of the property is its reasonable rents, which range from \$500 for weekdays during low season up to \$1600 for weekends from May to October.

### CHARGES AND BOOKINGS FOR EVENTS

	Season	Mon to Fri	Friday Evening	Sat, Sun, Holidays	Avg. Annual Bookings
All Events	May-October	\$600	\$ 1,000	\$1,600	39
All Events	November-April	\$500	\$ 700	\$ 900	6
Total Events					45

Rents do not include tent rental, which must be arranged through an approved vendor. The rental fee includes:

- Exclusive use of the 1260 sq. Ft. Carriage House function room.
- Use of the grounds, including Italian Garden and Dorothy Codman Garden
- Fully equipped catering kitchen
- On-site baby grand piano
- Event Supervisor for the day
- One year Associate Membership to Historic New England

There are three bathrooms for the Carriage House. Codman Estate does not have a liquor license. The caterer’s (or the supplying liquor vendor’s) license must be used.



## Community Access and Events

The main house on Codman Estate is a museum, featuring early 19th century portraits, landscapes, sculpture, furniture, and memorabilia from all eras that the Codman Family occupied the house, from the late 18th century to mid-twentieth century. It is open to the public two Saturdays a month for an admission charge of \$6.00. According to the facility's manager, the Carriage House is available to community groups at a discounted rent, but she could not quote the discounted amount since there have been no requests from community groups to use the facility.

Every September, the annual Codman Estate Fine Arts and Craft Festival is held featuring the work of more than 100 artisans, including wooden furniture and toys, pottery, photography, jewelry, glass, knitwear, children's clothing, metalwork, and folk carvings. There is live entertainment, food, children's activities, and tours of the Codman Estate.

## Staff

Two full-time staff are employed to coordinate private events – an Events Supervisor and an assistant. Support staff for maintenance, landscaping, and cleaning are provided by Historic New England, which operates 36 properties throughout the region. No information on staff salaries or on the financial performance of the facility is available.



# ATTACHMENT E

## COST ESTIMATES

### Estimate: Access Improvements

		<i>Unit Cost</i>	<i>Total Cost</i>
Commercial Street Driveway Replacement			
Length of Drive	500		
Width of Drive	22		
Paving in SF	11,000	\$ 15	\$ 165,000

### Estimates: Building Renovations

	<i>SF</i>	<i>Unit Cost</i>	<i>Total Cost</i>	
Exterior Main House			\$ 150,000	<i>Allowance</i>
1st Floor Main Estate House	2007	\$ 300	\$ 602,100	
Rem. Main Estate House	3106	\$ 275	\$ 854,150	
Children's Playhouse	500	\$ 250	\$ 125,000	
Carriage House	2800	\$ 150	\$ 420,000	
<i>Total all Buildings</i>			\$ 2,001,250	

### Estimate: Parking

	<i>Spaces</i>	<i>Unit Cost</i>	<i>Total Cost</i>
Event Parking Lot	70	\$ 8,000	\$ 560,000

### Estimates: Property Restoration and Improvements

	<i>LF</i>	<i>SF</i>	<i>Unit Cost</i>	<i>Total Cost</i>
Trails	2400		\$ 8	\$ 19,200
Gardens		10,000	\$ 9	\$ 90,000
Vista pruning	40		\$ 300	\$ 12,000
	trees		per tree	