



TOWN OF HAMILTON

APPLICATION FOR COMMUNITY PRESERVATION FUNDING

Date: February 8, 2018

Project Title: *Patton Homestead Preservation Project*

Name of Applicant: *Town of Hamilton/Patton Homestead Inc. Board of Directors*

Name of Organization: *Town of Hamilton/Patton Homestead Inc. Board of Directors*

Address: *577 Bay Road, Hamilton, MA 01936*

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CPA Category (underline all that apply): **Open Space** **Historic Preservation**

Recreation **Community Housing**

CPA Funding Requested: \$200,000 **Total Project Cost:** \$1,000,000 (estimate)

Please attach answers to the following questions. Include supporting materials as necessary.

1. Project Description: *Please give a detailed project description, including specific objectives.*

On May 12, 2012 the Town of Hamilton voted unanimously to accept Mrs. Joanne Patton's gift of her home, stables and 27 acre estate. This proposed project is to renovate and preserve this historically significant Patton Homestead building that is an important element of Hamilton's historic legacy. In April 2015 the Town appointed a **Patton Homestead Board of Incorporators** to analyze potential uses of the Homestead and identify grants and other funding sources for renovations. \$250,000 from the sale of 4 acres for housing was set aside per the gift agreement for this purpose. An additional \$250,000 was transferred to the Patton Homestead Fund by act of town meeting in April 2016. \$100,000 of these latter funds has been allocated for the Homestead's renovation with the remainder allocated for ongoing and future Homestead operating expenses.



The Board of Incorporators subsequently became the **Patton Homestead Inc. non-profit** with the following mission statement.

“The Patton Homestead Inc. supports, preserves, and manages the historic Patton Homestead as a community asset and provides educational, recreational, and cultural opportunities.”

It is currently working with the Town Manager and his staff in an advisory and support role in achieving that mission. To that end, the non-profit submitted a detailed **Recommendation that the Town of Hamilton Directly Manage the Patton Homestead for the Benefit of the Town** to the Hamilton Board of Selectmen on March 17, 2017 that described in detail proposed uses for the Homestead as a town center that would provide needed and beneficial space and services for a variety of town functions. It also indicated that revenue from the proposed uses would make the Patton Homestead self-supporting, thus requiring no taxpayer support. A copy of that Recommendation is attached.

In December 2015 the Town received a comprehensive, 20 year capital facility evaluation by the **Nonprofit Finance Fund**. This **Systems Replacement Plan** provided detailed information regarding short and long term capital needs of the Homestead. The report indicated that the cost for a complete renovation to the Homestead could be on the order of \$1M, depending on the scope of renovations. In November 2017, the town engaged the firm of **Spencer & Vogt Group, architecture preservation (S&V)** to develop an architectural design and construction plan for the full renovation of the Homestead. Their estimate for comprehensive building renovations confirmed the \$1M estimate. This CPA request for \$200,000 combined with the previous \$45,000 granted by the CPA and existing funds will be used for complete *exterior* repair and renovation of the Homestead, estimated by S&V to cost \$265,000. S&V further indicated that the project will be prepared for bidding in the summer of 2018 with construction beginning in the fall of 2018 and completed by December 2018.



2. Goals: *How does this project accomplish the goals of the CPA? (See Guidelines for Project Submission for general criteria)*

One of the purposes of the CPA is to acquire, preserve and rehabilitate historic resources. While many communities have used CPA funds to acquire historic properties and open space, Hamilton is fortunate to have received the Patton Homestead and 27 acres as a gift. This project is to preserve and rehabilitate the Homestead so that it is available for public use.

This project helps accomplish all four (4) of the general criteria for historic properties to qualify for CPA funding:

- a. *Address objectives or projects identified specifically within the Master Plan, the Heritage Landscape Inventory, or the Town's scenic roads bylaw.*

As noted in the Community Preservation Plan, one goal from the Master Plan and the Heritage Landscape Inventory is *“Complete capital projects to rehabilitate Town Hall and other historic properties, both within and outside of Hamilton's Historic District.”* The Patton Homestead meets the criteria for a historic property.

Built in 1786, the Patton Homestead is located on Asbury Street, a scenic road as designated under MGL Chapter 40 section 15c.

The following paragraph, which specifically mentions the Patton property, is taken from the Heritage Landscape Inventory, page 8:

Estates

*Hamilton has an outstanding collection of estates that were developed primarily as gentleman's farms during the late 19th and early 20th century. These include the Bradley Palmer, Pingree, Appleton, Totten, Moseley, Winthrop and **Patton properties**. Many are in highly visible locations and are important to the character of the community and the region. Some, such as Appleton Farms and Appleton Grass Rides, are already permanently protected. Others remain in private ownership. In most cases these properties are not well documented, which is an important goal of this Heritage Landscape Inventory Program. Community members expressed strong concerns about development pressures and were interested in exploring options that would preserve important visual features of former estates but allow for more flexible uses.*

The Patton Homestead is one such property and this project is consistent with the goal to *“preserve important visual features (and) ...allow for more flexible uses.”*

- b. *Preserve historic resources that are eligible for National Register status or that are within the historic district.*
- Since 1928, the Patton Homestead has been the home of two famous American Generals -- WWII General George S. Patton Jr. and his son, Korean and Vietnam conflicts Major General George S. Patton III.
 - Designation for National Register status may be pursued. Criteria for inclusion on the National Register are connections to historic events, architectural development, or *significant people*. The Patton family certainly qualifies as *“significant people.”* The Patton Homestead also contains the Patton family archives and memorabilia, now managed by the Wenham Museum. Note that in the future, the Patton Homestead may also be listed in the Massachusetts Register of Historic Places.
 - As an example of how others perceive the Patton family, in October, 2013 the Essex National Heritage Commission awarded its 2013 Essex Heritage Hero Award to the Patton family for their service to community, heritage, and country. From their generations of military service to their involvement with countless nonprofit and service organizations locally and across the globe, the Pattons were lauded for their generosity and commitment to others. *“They are true heroes to those who care about this region and beyond,”* said Annie Harris, executive director of the Essex National Heritage Commission.

- The Essex National Heritage Commission highlighted the Pattons' contribution to the region in the event program: *"Since arriving at Green Meadows Farm in South Hamilton in 1928, the Patton family has created a legacy of public service and preserving the natural and cultural resources of Essex County. In 1980, Green Meadows became the permanent home of Joanne Patton and her family when her husband, Major Gen. George S. Patton, retired from his military career, and she immediately immersed herself in community service. From the Red Cross to the North Shore Association for Volunteerism to Operation Troop Support, the list of nonprofit organizations that have benefited from Joanne Patton's dedication is long and diverse. Upon her husband's death in 2004, she became overseer of Green Meadows Farm, sustaining her husband's agricultural legacy and providing educational programs to encourage future generations to appreciate and preserve farming."*

c. *Leverage other historic preservation funding.*

The Patton Homestead Inc. non-profit is currently working with the Town Manager to secure the funding required for the complete Homestead renovation. This proposal to the CPA for \$200,000 plus the \$45,000 previously granted for renovation work on the Homestead are essential components of that funding. In addition to its use to fund exterior renovation costs, it can serve as matching funds for additional funding requests. Following is the status of various funding requests.

Source	Amount	Status
Initial Land Sale allocation	\$250,000	In hand
Transfer from Stabilization Fund	\$100,000	In hand, allocated for renovations
CPA Grant	\$ 45,000	In hand
This CPA request	\$200,000	This funding request
Mass Cultural Commission	\$225,000	Application for funding submitted
State Veterans Preservation Project	\$ 15,000	Application for funding submitted
Mass Preservation Projects Fund	\$100,000	Application being investigated
Other local sources	\$100,000	Proposed
Total to Date	\$1,035,000	

A number of additional, promising grants for funding the cost of additional building renovations and site landscaping are also being pursued..

d. *Support historic properties that provide a clear public benefit.*

The Patton Homestead and 14 acres of surrounding land bordering the Ipswich River are a public park available for a variety of recreational activities by town citizens. An initial public event, "Snow Day at the Patton Homestead", is scheduled for Saturday, February 10. It invites town members to visit the Homestead for an afternoon of snow shoeing, cross country skiing, sledding, marshmallow roasting, and a variety of other winter activities.

Among the many additional events and services that the Patton Homestead Inc. nonprofit will expect to provide to fulfill their mission and thereby "provide a clear public benefit" are the following: See attached Recommendation to the BOS.

- provide space and services for public meetings and other public events
- be available for rental for private events by townspeople and others
- be available for veterans' organizations for meetings and other military related activities and events
- provide tours of this historic property and the Patton Family Archives
- provide restrooms and food service facilities for townspeople and others who use the grounds for cook outs, hiking trails, cross country skiing, Town sponsored events, river walks (being built in partnership with Essex Greenbelt for birding and canoeing), scouting events, and other passive recreation.

As evidence of the potential popularity of the Patton Homestead for these kinds of activities, the Executive Director of the North of Boston Convention and Visitors Bureau has stated that the Patton Homestead will most certainly be a popular tourist destination. An example of this is the annual Military History Day sponsored by the Wenham Museum where over 1,000 people attended to view a variety of historic military displays including a Patton tank and a Blackhawk helicopter.

3. *Timeline:* *What is the schedule for project implementation, including a timeline for all critical milestones?*

The complete renovation of the Patton Homestead and landscaping of its grounds is planned to be undertaken in several phases. A conceptual draft Master Plan of the first floor of the Homestead is shown following.

Phase 1 is devoted to making the first floor core space of the Homestead available for public use. A conceptual draft plan (Scheme 2) of the core space is also shown following. In addition to the restoration and repair of the external envelope and updating HVAC, electrical and plumbing systems, the public use spaces shown in Scheme 2 include:

- An ADA handicapped accessible entrance
- Renovation of the 3 main rooms of the Homestead for use as meeting and function space
- A warming kitchen for use by food caterers
- Two handicapped accessible bathrooms
- Office space for a future site manager

Spencer & Vogt have provided the following time line for completing Phase 1.

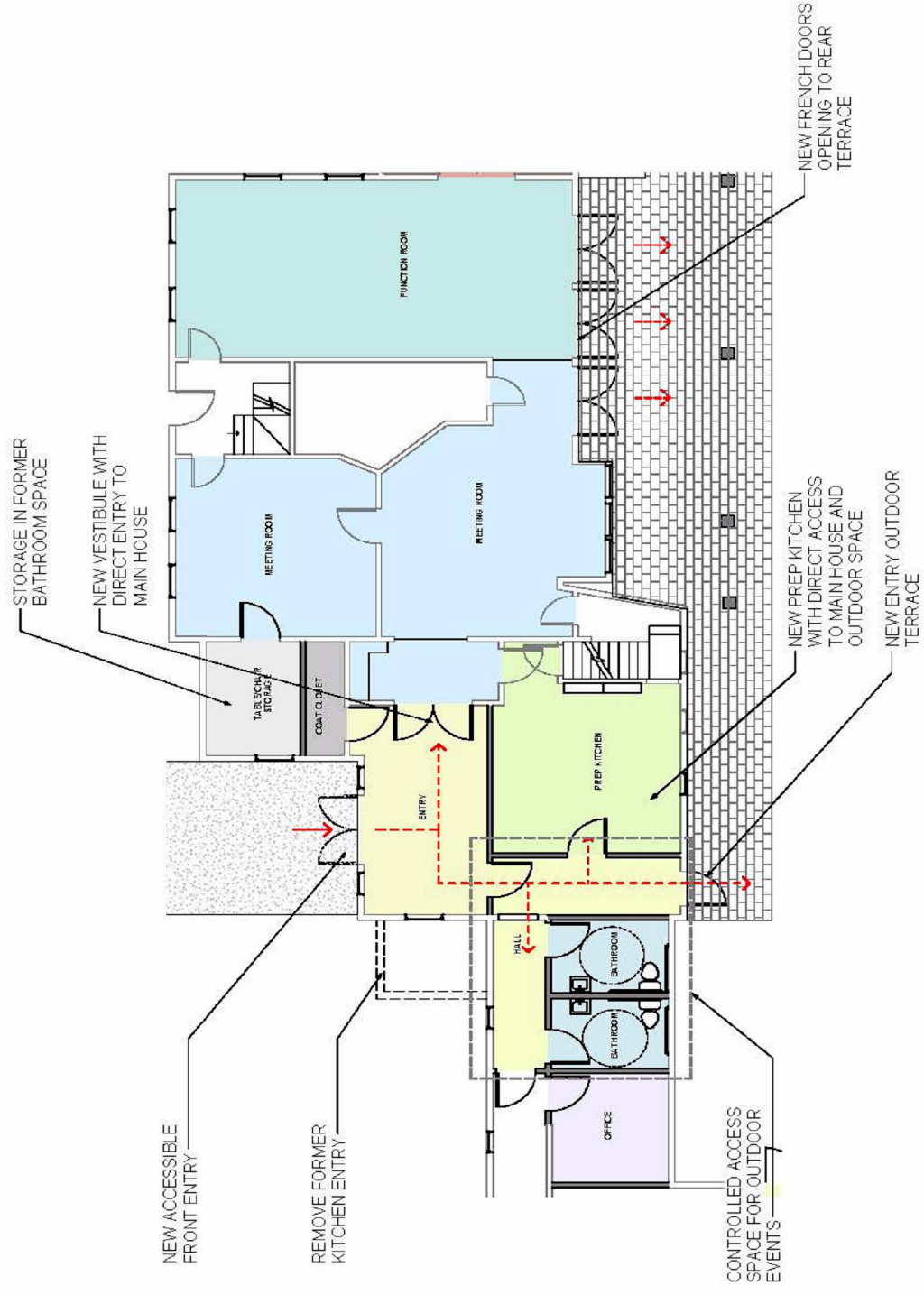
Task	Start Date	End Date
Feasibility Study Programming Needs Assessment Condition Assessment	Dec. 15, 2017	March 1, 2018
Schematic Design Design Development	March 1, 2018	May 1, 2018
Construction Documents	May 1, 2018	July 1, 2018
Bidding	July 1, 2018	Sept 1, 2018
Construction	Sept 1, 2018	Dec. 1, 2018

If all dates and deadlines can be met, the Patton Homestead Inc. Board of Directors is projecting that the renovated property will have a grand opening in the early spring of 2019.

PATTON HOMESTEAD - DRAFT MASTER PLAN



PATTON HOMESTEAD - CONCEPTUAL DRAFT SCHEME 2



CONCEPTUAL DRAFT SCHEME 2
1/14/14

4. Budget: Please provide a full budget including the following information, as applicable.

a. Total amount of the project cost, with itemization of major components.

The full scope of renovating the Homestead and its grounds has not yet been determined. The architect was asked to phase the total project so that non-taxpayer funding sources can be obtained prior to the construction of each phase. Patton Homestead Inc will work with the Town Manager and his staff to achieve the business plan recommended to the BOS (attached) and for the fundraising required to achieve its full scope.

Currently, only Phase 1 is being considered. Phase 1 provides for the immediate availability for use of the Patton Homestead’s core space as shown in the previous drawing (Scheme 2). The cost for this renovation is estimated by S&V to be \$891,000. It comprises 5 major components as described in the following table along with estimated costs based on an analysis by Spencer & Vogt.

Phase 1 renovation of the Patton Homestead

Description	Estimated Cost
Create ADA accessible entrance at the front of the Homestead	\$ 30,000
Renovate easterly section with new entry lobby, coat room, chair and table storage, caterer warming kitchen, ADA accessible bathrooms, site manager office, and entrances to rear courtyard	\$145,000
Structural reinforcement of first floor	\$ 50,000
Add air conditioning and lighting, paint walls and ceilings, refresh floors, of core areas	\$170,000
Exterior envelop: carpentry repairs, masonry restoration, preparation and painting, roof replacement	\$265,000
Contingency (20%)	\$132,000
Architectural and Engineering Services (15%)	\$ 99,000
Total Phase 1 costs	\$891,000

A detailed breakdown of the \$265,000 estimated for the exterior envelope renovations is given following. It is funding of these renovation costs that is requested of the CPA.

Cost Estimate for Patton Homestead Exterior Preservation Work		
	Description: Scope of Work	COST
04 0000 Masonry		
Center chimney, main block	Selective repointing with historically correct mortar	\$5,000
South gable brick end	Selective repointing with historically correct mortar	\$5,000
04 0000 Masonry Subtotal		\$10,000
06 0000 Wood & Plastics		
Complete exterior	Selective carpentry repairs on cladding, trim	\$40,000
06 0000 Wood & Plastics Subtotal		\$40,000
08 0000 Windows & Doors		
54 units	Preservation of wood, single glazed windows include paint removal, wood repairs, removal and rehabbing window glass, priming. Weather-stripped and replacement of sash ropes as applicable.	\$54,000
10 units	Preservation repairs, including hardware.	\$10,000
54 units	Storm Windows	\$40,000
08 0000 Windows & Doors Subtotal		\$104,000
09 0000 Finishes		
Exterior painting	Prepare and paint all exterior wood cladding, window sashes, doors, cornices and related trim using historic paint colors determined through paint analysis.	\$55,000
09 0000 Finishes Subtotal		\$55,000
Subtotal Construction:		\$209,000
General Conditions	10% of construction budget	\$20,900
General Requirements	5 % of subtotal for scaffolding, shoring, dumpsters	\$10,450
Subtotal Construction and General Conditions/Requirements		\$240,350
Overhead & Profit	10% of Construction Cost	\$24,035
Combined Construction Cost		\$264,385
Contingency	15%	(Not Included)
Architectural/Engineering Expenses	15% of Combined Construction Cost	(No Included)
TOTAL CONSTRUCTION BUDGET		\$264,385

b. Additional funding sources. Please include those that are available, committed, or under consideration including fundraising, other grants, etc.

As noted earlier, the Patton Homestead Inc. Board of Directors is working with the Town Manager and his staff to secure funding for the full renovation of the Patton Homestead and its grounds. The status of this activity is shown in the following table. This proposal to the CPA for \$200,000 plus the \$45,000 previously granted for renovation work on the Homestead are essential components of that funding. In addition to its use to fund exterior renovation costs, it can serve as matching funds for additional funding requests.

Source	Amount	Status
Initial Land Sale allocation	\$250,000	In hand
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Mass Preservation Projects Fund	\$100,000	Application being investigated
Other local sources	\$100,000	Proposed
Total	\$1,035,000	

Patton Homestead Inc. is also pursuing additional sources of funds and will undertake fund raising activities once it has recruited the services of a managing resource. Recruitment of managing resources is currently underway.

c. Describe the basis for your budget and the sources of information you used, including evidence detailing that the lowest bid has been received.

In July 2017, the Town of Hamilton issued an RFQ for design and construction services for the renovation of the Patton Homestead. Six architectural firms responded to the RFQ and were evaluated by Town staff and members of the Patton Homestead Board of Directors. After careful analysis of the firms' history, experience, interest, and capability, **Spencer & Vogt, architecture preservation** was selected to provide the requested design and construction services. A contract with S&V was signed in November 2017, and Town and Board members have been meeting with S&V to develop a concept plan for the renovation with estimated costs and timeline for Phase 1. The concept plan, budget, and timeline for Phase 1 renovations are derived from their analysis.

5. Support: *Have the appropriate Town Boards and Commissions expressed support and/or approved the project? What is the nature and level of community support for this project? Please provide evidence that you are qualified and eligible to undertake the project.*

The renovation of the Patton: Homestead for community use has a long history of support by the Hamilton Board of Selectmen, other town boards, and town voters.

- On May 12, 2012 Town meeting voted unanimously to accept Mrs. Joanne Patton's gift of her home, stables and 27 acre estate.
- On April 5, 2014 Town meeting approved an amendment to the gift agreement that provided for the sale of 4 acres of the Patton land for housing. The land was subsequently sold for \$1M, with 25% (\$250,000) dedicated to a fund for the renovation of the Homestead...

- In April, 2015 the BOS appointed a Board of Incorporators to establish a 501(c)3 nonprofit organization to manage the Homestead in a manner that would be self supporting. This subsequently became the current Patton Homestead Inc. non-profit.
- On April 2, 2015, Town meeting voted to allocate an additional \$250,000 from the land sale to the fund for Homestead renovation.
- On October 22, 2016, the town approved \$45,000 from the Community Preservation Fund to fund repairs to the roof and dormers of the Homestead.
- On March 6, 2017, Patton Homestead Inc. presented **A Recommendation that the Town of Hamilton Directly Manage the Patton Homestead for the Benefit of the Town** to the Hamilton BOS. The Recommendation was essentially a business plan for the Patton Homestead that described a management structure, proposed uses for the Homestead, and a financial analysis that showed how the Homestead could be self supporting. The Recommendation is attached..
- Based on that Recommendation a working relationship was established between the Patton Homestead Board of Directors and the Town Manager and his staff to implement the Patton Homestead renovations. This proposal for renovation funding to the CPA is an example of that relationship.
- In the fall of 2017, approval for the construction of a parking lot at the Paton Homestead was obtained from the Hamilton Planning Board. The parking lot was subsequently constructed by the Hamilton DPW and is available for use...
- The Hamilton Historical Society has expressed interest in maintaining a permanent home for their archives at the Homestead. Discussions of that possibility are underway. Identification of the Society's space needs is being developed so that potential space in the Homestead can be evaluated.
- The Patton family archives and memorabilia continue to be housed in the south wing of the Homestead. The Wenham Museum is presently working with Mrs. Patton to obtain ownership of these valuable, historical materials. The Town Manager is developing a lease agreement with the Wenham Museum to maintain the resources in their present location. The Town is also working with the Wenham Museum to secure funding for updating and renovating their portion of the Homestead so that these materials can be properly maintained.
- In July 2015, 2016, and 2017, the Wenham Museum leased the property for Military History Day. Military History Day was previously held at the Wenham Museum. Tours of the archives were offered at each event and all tours were fully subscribed. Attendance at this event has grown from 200 in 2015 to over 1,000 this past summer.
- On February 10, 2018, a Patton Homestead Snow Day will be held for the benefit of Hamilton families. It will include snow shoeing, cross-country skiing and sledding on the grounds as well as marshmallow roasting and other events for children. It is designed to introduce, educate, and involve Hamilton citizens in how the Patton Homestead can be enjoyed for a variety of activities and events.

**A Recommendation that the Town of Hamilton Directly Manage the Patton
Homestead for the Benefit of the Town
Submitted by Patton Homestead Inc.**

March 14, 2017

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EXECUTIVE SUMMARY

This is a proposal to the Hamilton Board of Selectmen from Patton Homestead Inc (PHI) for the Town to directly operate the Patton Homestead & Stable as a community asset in a manner that is not a financial burden.

The proposal is for the Selectmen:

- to form the “Patton Homestead Committee” of approximately seven members,
- to establish a revolving, enterprise, or other property-specific fund so that all Homestead operating and capital expenses and revenues are fully transparent in a single location in the annual Town Budget; and
- to hire a part-time director to manage the Homestead in an organizational approach that is consistent with our structure of town governance.

The objective of this recommendation is for the Board of Selectmen to create a structure that allows the Town to generate revenue at the Homestead that will make the property entirely self-supporting.

The Patton Homestead Inc is the non-profit initially created by the Selectmen and which will be dissolved once the new recommendation is accepted by the BOS and the non-profit is no longer necessary for fundraising. The PHI was originally formed to so it could accept tax-deductible donations and fundraising proceeds. PHI has since learned that the Town can accept tax-deductible funds so the non-profit is no longer necessary. Furthermore, PHI does not believe that any revenue generated by the Homestead should be directed to support the administrative costs and burdens that are associated with the maintaining the non-profit as a separate legal entity. All revenue should belong to the Town. PHI recommends that the Town be reimbursed for any expenses it incurs at the Homestead. The Town should also try to manage the property so that even capital expenses might be funded from property operations and not be incurred by Hamilton’s taxpayers.

Other towns on the North Shore, such as North Andover, have already proven the concept that town-owned historic properties can be operated in a self-sustaining way.

HISTORY

In 2012, Joanne Holbrook Patton gifted to the town of Hamilton the Patton Homestead at 650 Asbury St.. The gift comprised 27 acres of land bordering the Ipswich River and included the former home of General George S. Patton and Major General George S. Patton. Information about this gift can be found at the [Patton Homestead & Archive](#) page on the Town of Hamilton’s website.

Per the gift agreement:

“the Property shall be used for the benefit of the Town’s residents. Ifit should become impossible or impracticable to use the Property in that way, the Town may sell any part or all of the Property, subject to compliance with the gift agreement.

Any use of the Homestead must acknowledge and respect its historic character. The town shall have the right to make exterior and interior changes....but must preserve any historical features of the Homestead unless it is impossible or impractical to do so given the proposed use and the expected cost of preserving such features.

The Town may separately solicit gifts to support the Property and may also rent the Property on a short or long term basis to generate income to provide for its support.

The Town shall establish a Patton Homestead Account and shall deposit 20% of the annual surplus revenues from rental or any other income derived from the use of the Property (i.e. the gross income received from the rental or other use of the Property during the fiscal year, less the costs and expenses incurred by the Town in managing and maintaining the Property during that year) as an endowment fund to maintain and preserve the Property. “

The Patton Homestead, Inc. non-profit was created by the Hamilton Board of Selectmen in Spring 2015 to manage the town-owned Patton Homestead and manage all programming at the property in a manner which will not be a financial burden to the Town. The non-profit applied for and subsequently received its 501(c)3 designation from the IRS in December 2015.

During this time the town was undertaking to build a light-footprint parking facility and conduct minor renovations so that the property would meet ADA accessibility requirements and could be used for public purposes.

In the meantime the non-profit’s Board of Directors developed the following mission and vision statement:

Mission: The Patton Homestead Inc supports, preserves and manages the historic Patton Homestead as a community asset and provides educational, recreational and cultural opportunities.

Vision: The Patton Homestead is a historic place where families, the community and Veterans enrich their lives. They do so through cultural events seasonal festivals, military focused programming, Veterans’ gatherings, social events and retreats.

In summer of 2016 Hamilton’s Town Manager decided that an RFP would be required prior to entering into an agreement for program management. The Town subsequently issued an RFP. Upon review, the non-profit discovered that the RFP was predominately for property management, a responsibility which was not aligned with the non-profit’s mission. Unfortunately, the non-profit was not able to meet the RFP’s technical criteria and, as a result, could not respond.

In the course of studying the property, analyzing comparable properties on the North Shore, and identifying programming opportunities the non-profit was able to develop a strong plan for making the Homestead a success for the community. The non-profit concluded that the Town could directly manage the Homestead and comply with the spirit and intent of the Gift Agreement. A separate non-profit would not be required.

Based on our research the Board hereby submits this management plan to the Board of Selectmen. The plan includes two distinct phases. The first is for the Town of Hamilton to make small renovations at the Homestead, including ADA accessibility and expanding the parking capacity, so that the facility can be used for meetings, assemblies and events. The second phase is to set up a management structure that works within our form of town government.

Once the Homestead renovations are complete an effective governance and operational structure made up of collaborations with community partners will result in programming and activities at the Homestead that will fund its ongoing operating and capital costs.

The rate structure for activities at the Homestead will have significant discounts for Hamilton residents and veterans.

The proposed management plan is to preserve this historically significant structure as an important element of Hamilton’s historic legacy and provide a community asset that will benefit Town residents.

In Hamilton there has been repeated support for the Patton Homestead as evidenced in the four (4) separate votes that have been taken by Town Meeting and in the recent town-wide survey:

- 1) May 12, 2012 Town Meeting voted unanimously to accept Mrs. Joanne Patton’s gift of her home, stables and 27 acre estate.

- 2) April 5, 2014 Town Meeting overwhelmingly approved an amended gift agreement which allowed for the selling of 4 acres for the building of 12 units of over-55 housing; partial proceeds from the sale of land (25% of sale price) would be placed in an endowment for the Homestead. This resulted in \$250,000 in a dedicated account “as an endowment to maintain and preserve the Property”. That sale also funded (i) \$500,000 dedicated into a stabilization fund for the Town’s recreational fields, and (ii) \$156,000 for Affordable housing which the Town then dedicated to the two units built by Habitat for Humanity on Asbury Street.

- 3) April 2, 2016 Town Meeting approved and dedicated the remaining \$250,000 from the proceeds of the land sale to the Homestead account to be used to maintain and preserve the Homestead, bringing the total to \$500,000.

- 4) October 22, 2016 Town Meeting approved \$45,000 from the Community Preservation Fund Balance to fund the repair of the roof and dormers at the Homestead.

The recent town-wide survey that was conducted by the Selectmen had two questions which remain relevant for the Patton Homestead. The first was Question # 8 “Should the Town of Hamilton..... put more effort into protecting the historic district and historically significant properties?” Of the 720 responses 56% said YES. Of the 11 choices only five had a higher number of YES answers of which 3 included protecting or increasing open space. The homestead is both a historic property and has open space that is owned and is accessible to the town. The second was Question #20 which asked “How important is it to you, even if it may involve public spending, to: ...Preserve buildings of historical or architectural interest”? Of the 667 responses 64% said important (41%) or very important (23%).

Furthermore, in the summer of 2014 tours of The Patton Family Archives were offered for the first time. Over 200 people attended - all tours were fully booked and a waiting list was developed.

The current membership of the Patton Homestead Inc non-profit includes residents: Carin Kale, Maureen Hickey, John McWane, Bill Burrige, and Marc Johnson



HOW OUR COMMUNITY WILL USE THE HOMESTEAD

Once renovated and publicized the Patton Homestead is where Hamilton residents, veterans and the general public will be able to enjoy:

1. *A quiet, scenic park;*
2. *Educational, recreational and cultural programs and events;*
3. *Community interior and exterior meeting spaces;*
4. *The Patton archives and artifacts;*
5. *An event center for up to ~75-90 in the Homestead or up to 125 people including the grounds; and*
6. *Access to the Ipswich river*

Exterior Events

In the immediate future the Homestead will be a location for the community to host a variety of exterior events which can be hosted on the grounds near the homestead. Examples of those exterior events are:

- Hamilton residents can use the property for family picnics or reunions. Families can arrange for and pay directly for a tent to be set up on the property.
- Canoe/kayak/bird watching access to the Ipswich River can be accommodated from either the new parking lot or from the wood road (no motorized access) from the abandoned well pump house.
- Seasonal Festivals sponsored by the Town or a local business can be held on the property.
- The Wenham Military History Day (already successfully held twice - 2015, 2016)
- Veterans' groups can use the property for gatherings. The [West Point Society of New England](#) has been holding picnics at the property for many years.
- Wedding ceremonies and/or tented, casual wedding receptions can be held on the property. Tents can be arranged directly on the property or through caterers.
- Popular car shows can be held on the property.
- Road races (start and finish lines) can be scheduled.
- Scouting events can continue to happen on the grounds.

Interior Events

Various events will take place inside of the house. The maximum capacity for events inside the house is 50 and 90 people, including the seasonal porch.

- Town boards, committees, groups can hold meetings in the house.
- Hamilton residents will be able to hold meetings and parties in the Homestead.
- Local societies will be able to book the homestead for presentations (e.g. book signings)
- The Hamilton Historical Society can organize and display exhibits of their archives.
- Tours of the Patton Archives may occur on a scheduled basis.
- Exhibits to highlight other aspects of our collective military history (e.g. Vietnam, cavalry)

Stables

- The PHC would work with the part-time Director, the Director of Planning & Inspections, the Board of Selectmen, and the Town Manager to establish plans to optimize using the stable and to develop appropriate renovation budgets and funding sources.



PARTNERS

The Patton Homestead non-profit has been in conversation with many area organizations who have expressed an interest in hosting events and activities at the property. Many of these organizations have already expressed interests in working with the Homestead and have encouraged the Town to preserve the property as a community and historic asset.

Attached as Exhibit G are letters of support and recognition regarding the Patton Homestead from organizations that have expressed an interest in working with the Patton Homestead Committee.

- Community House
- Wenham Museum
- Hamilton Historic Society
- Joint Recreation Board
- [West Point Society of New England](#)
- Brad Hill, State Representative & Assistant Minority Leader
- [The Musary](#)



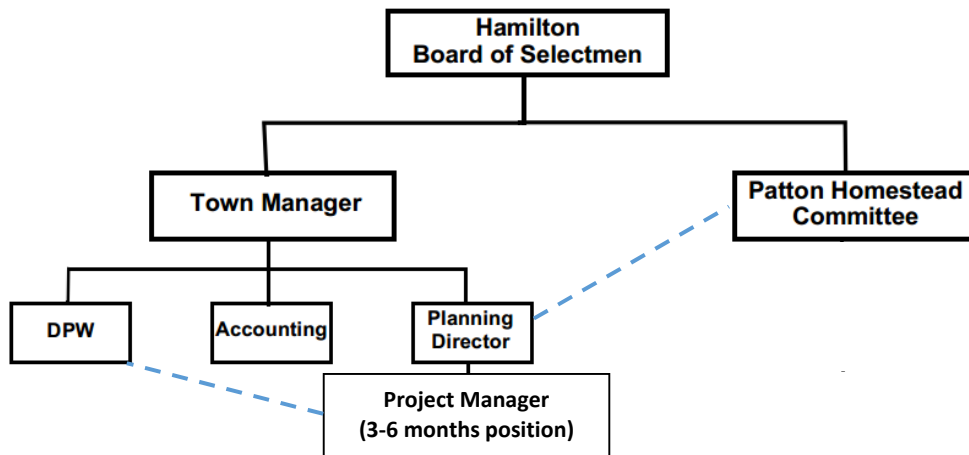
GOVERNANCE & STAFFING

Phase I: Renovations

The Hamilton Board of Selectmen will appoint a Patton Homestead Committee to work with Director of Planning and Inspections (Patrick Reffett) and Town Manager. Town Manager will hire a part-time Project Manager (possibly an architect) for 3-6 months to complete the identified Phase 1 renovations.

The part-time Project Manager will work with Director of Planning & Inspections, Town Manager, DPW and other appropriate town departments to price, bid, and complete the initial renovations. Once the Phase I renovations have been completed the part-time project manager position will be eliminated. Patton Homestead Committee will help and consult where appropriate and the Patton Homestead non-profit will be dissolved.

Patton Homestead Organization Structure



Phase II: Operations, Scheduling, Grant-Writing, Fundraising

The Patton Homestead Committee will work with and report to the Board of Selectmen and Town Manager on policy matters regarding the Homestead (e.g. fee schedules, use guidelines, insurance requirements).

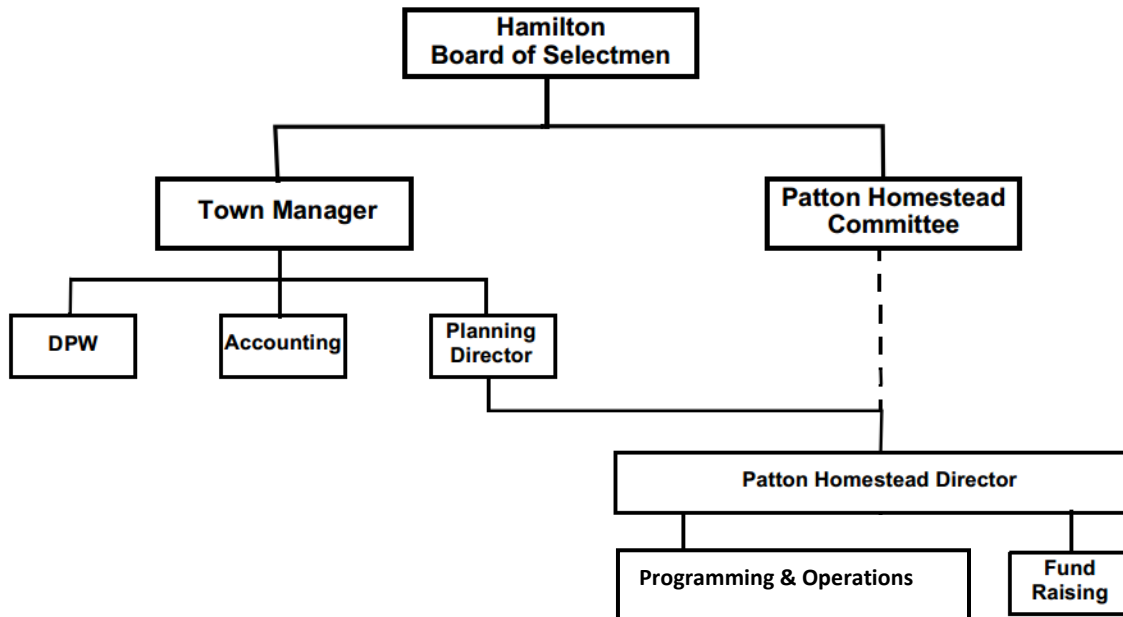
The Patton Homestead Committee will work with the Director of Planning and Inspections (Patrick Reffett) and Town Manager to create the job description for a part-time position of Director of the Patton Homestead. The Town (Town Manager) will hire the part-time Director who will be responsible for the operations of the Homestead.

The part-time Director will report to the Director of Planning & Inspections and will coordinate with the Town DPW regarding the maintenance of the property. Many functions will be coordinated directly from the Homestead in conjunction with bidding and other instructions from Town Manager. These operations will be structured within annual budgets developed with Town Manager. All operating and capital budgets should be reviewed by the Board of Selectmen and should be transparently presented to Town Meeting for its review and approval.

The part-time director will be responsible for

- scheduling, managing and staffing (paid and volunteer) all interior and exterior events to be held at the property.
- working with the Patton Homestead Committee to plan and arrange fundraisers for the Property or for specific programs.
- working with the Patton Homestead Committee to find and write grants to support the operations, programming and future capital improvements at the property.

Patton Homestead Organization Structure



The Patton Homestead Committee will work with the part-time Director to identify and prioritize future building & grounds and capital projects that might serve the Homestead’s mission, including renovations of the stable based on pre-identified uses. The PHC will provide support, where appropriate, as budgets are considered and developed for potential future projects.

RENOVATIONS

Before any programming, community activities or fundraising activities can take place the town-owned property must comply with ADA requirements and all other federal, state or local building or access codes for a public building. When the Homestead was a private home such requirements did not pertain.

In December, 2015 the Town received a professional, comprehensive report, the so-called ‘Systems Replacement Plan’, a 20 year capital facility evaluation conducted by the Nonprofit Finance Fund. The report provides detailed information regarding short term and long term capital needs of the Homestead.

To deliver the short term vision, a renovated Homestead must comply with ADA and other requirements for public buildings include the following:

- Adequate parking
- Accessible bathrooms
- Exterior repairs
- Exterior landscaping
- Improved fire safety, extinguishers, exit signs
- Improved security systems
- Electrical system up to code
- Fully accessible entrance to the house
- Fully functioning HVAC system
- Water heater
- Up to date plumbing and backflow prevention
- Sanding and refinishing wood floors
- Separate archives entrance (possibly)
- Functional kitchen for caterer set up (possibly)

The \$500,000 currently available will be used to begin the short term renovation projects. The Town has already applied for \$337,000 of matching grants from the Massachusetts Cultural Council. The Patton Homestead Committee will work with the Town to develop an alternative scope of work as a backup plan in the event that the Massachusetts Cultural Council grant is not awarded. Both the MCC budget and the back-up budgets are presented in Exhibit E “Renovations – MCC Budget and Proposed”.

Immediately after the BOS and Town Manager choose to go this route and appoint a Patton Homestead Committee, the PHC will have working sessions with the DPW Director and the Director of Planning & Inspections in order to review the intended near-term uses for the property and to prioritize/triage which renovations would be essential for near-term operational needs of the homestead. The goal would be to establish a scope of work, budget and action plan to be used in the event that the MCC grant is not funded or is not fully funded at the requested amount.

The Town should hire a part-time project manager to work with the DPW Director and report to the Director of Planning and Inspections. Alternatively, if the scope of work can be condensed, then the town might go through a qualification process and find a site designer/architect to manage the initial renovations.

	<u>Town MCC Budget</u>	<u>PHC Draft Budget</u>
Exterior Improvements	397,500	pending working session w/DPW
Interior Improvements	87,000	pending working session w/DPW
System Upgrades	96,000	pending working session w/DPW
Architectural Assistance	<u>45,000</u>	pending working session w/DPW
Project Total	667,575	
Requested from Mass Cultural Council Grant Request	333,787	
Already Funded From Hamilton CPA	45,000	
Remainder from Patton Homestead Stabilization Fund	288,788	

HOMESTEAD & PROPERTY BUDGET

Analysis of Whether Patton Property Gift is Burden to Town Of Hamilton

(Refer to Exhibit A)

	2018	2019	2020+
Patton Ridge Senior Housing (12 condos; excluding excise taxes)			
Patton Ridge Senior Housing Tax Revenue (FY17 tax rate)	144,848	144,848	144,848
Patton Homestead Fund			
Total Revenue from Operations & Fundraising	53,515	119,755	151,315
Total Operating Expenses & Incidental Capital Expenses	-63,294	-91,146	-91,506
Reimbursements to Town of Hamilton		-20,000	-20,000
Patton Homestead Net Cash Flow	-9,779	8,609	39,809
Funding From Town of Hamilton	9,779	0	0
Homestead Capital Endowment Fund	0	1,722	7,962
Patton Homestead Fund	0	6,887	31,847
Reimbursement for Town Services	0	20,000	20,000
Net Benefit (Cost) of Patton Property to Town of Hamilton	\$ 135,069	\$164,848	\$164,848

Before 2012 the property generated approximately \$34,000 in tax revenue as a private residence. Under this plan the property will generate a net of \$135,000 in 2018 and \$165,000 in all later years when the property will be completely self-supporting. The net increases vis-à-vis when the property was a private residence will be over \$100,000 in 2018, and over \$130,000 in all later years. The property and Homestead will not be a financial burden to the town.

The 12 Patton Ridge senior housing apartments are collectively the second highest tax payer in the Town of Hamilton, second only to Myopia Hunt Club and significantly greater than the shopping center on Bay Road. The Patton Ridge senior apartments pay 0.5% of the town's total real estate tax bills, so every homeowner in town has essentially had their tax bills reduced by 0.5%, or \$45 for the average single family tax bill (*Mass DOR FY17 At-A-Glance report; Assessed Value of Single Family \$538,228; Average Single Family Tax Bill \$9,048*).

Summary of Patton Homestead Revenue - All Sources

(Exhibit B for details and assumptions)

Once the Homestead renovations have been completed then programs, events hosted at the property and fundraising will allow the Homestead to become 100% self-supporting.

The Patton Homestead Committee will work to establish a marketing plan with the Director in order to establish the property as a resource for our community's residents and as a regional location for meetings and events. The PHC will hold fundraising events and help the director find and write grant requests to support the operations and capital requirements of the Homestead.

	2018	2019	2020+
Committee Sponsored Lectures & Events	2,500	4,000	4,000
Fundraising Special Events	5,000	10,000	10,000
Grants - sponsorships, exhibits and programming	1,000	40,000	60,000
Event Rentals	39,015	59,755	71,315
Office/Archive Space rent	6,000	6,000	6,000
Total Revenue	53,515	119,755	151,315

Note that projections include very moderate goals for fundraising. The budget steps from just \$7,500 in 2018 to \$14,000 in the later years. In light of recent discussions with the Wenham Museum these fundraising figures are likely completely understated.

Summary of Patton Homestead Revenue by Event Revenues

(Exhibit C for details and assumptions; note that the below revenue projections include significant discounts for Hamilton residents and veterans)

Event Type	2018		2019		2020+	
	#/year	Revenue	#/year	Revenue	#/year	Revenue
Town board/committee mtgs	30	0	30	0	30	0
Small Breakout/Patio (2-3 hrs)	14	3,315	20	4,760	20	4,760
First Floor 1/2 day	14	5,780	20	8,330	20	8,330
First Floor All-day	14	9,690	20	13,940	22	15,130
Outside All-day	8	7,480	10	9,350	12	11,220
Non-tented Weddings	10	12,750	5	6,375	5	6,375
Tented Weddings (plus rentals)	0	0	10	17,000	15	25,500
	60	39,015	85	59,755	94	71,315

The property has several resources which can both generate revenue and also be used as community assets. The center of the first floor can be a location for meetings, seminars, lectures, small gatherings. The porch and patio can accommodate meetings and small-scale community’s parties and events. The grounds can be used as locations for community get-togethers, concerts, picnics and similar events (e.g. family reunions). Hamilton residents and veterans will have preferred rate structure for all usage fees. The exterior can also be used for small weddings and even tented weddings. The two east side rooms on the first floor is currently used for archives and the west side can also be used for meetings and/ or galleries and exhibits. The barn and the stables as well as the main house’s second and third floors can also be deployed after the Town has more experience with operating the property.

Summary of Patton Homestead Operating Expenses

(Exhibit D for details and assumptions)

	Sept-Dec 2017	2018	2019	2020+
Personnel	11,286	35,004	52,306	52,666
Employee Related Expenses	0	200	500	500
Business Expenses	1,400	5,600	9,200	9,200
Advertising & Marketing Expenses	0	3,000	7,000	7,000
Facility Expenses	0	12,740	16,140	16,140
Fundraising	400	2,500	5,000	5,000
Town Services	0	0	20,000	20,000
One Time Purchases	10,250	4,250	1,000	1,000
Total Expenses	23,336	63,294	111,146	111,506

The operations of property will require a Director to address programming, operations, small scale capital projects and fundraising. Each event will be managed and/or staffed by the Director, or a combination of volunteers and part-time contracted labor that have been trained and vetted by the Director under the broad supervision of the Town Manager. Note that the operating budget includes two hours of temporary help at \$20 per hour for every event scheduled. Additionally, ‘facility manager’ type fees would likely be charged directly to users at major events.

ZONING & PERMITTED USES

The entire Patton property, including the Homestead, is located in Hamilton’s RA “Residence-Agricultural” zoning district. The property was gifted by Joanne Holbrook Patton on September 27, 2012 to the Town of Hamilton.

The Town of Hamilton reformatted its Zoning Bylaws at Annual Town Meeting in April 2016. As of February 2017 the reformatted zoning bylaw is close to being approved by the Commonwealth’s Attorney General.

All of the uses that are proposed for the property by the Patton Homestead, Inc’s Board of Directors are permitted by right according to the “Table of Use Regulations in section 3.1.3 of the Zoning Bylaw.

Specifically, Section “B. Community Facilities” of the Table of Use Regulations reads: “Museums, libraries and parks, playgrounds, conservation areas, water supply areas and other land owned and operated for the public enjoyment or service by a public or semi-public agency” are permitted uses. The Town of Hamilton is a public agency, the property is owned and operated by the town, and the property will be operated as a community facility for the benefit of the Hamilton residents.

Other communities in the area (e.g. North Andover, Danvers, Beverly, and Topsfield) have town-owned or semi-publically owned facilities that are often used for events, assemblies and meetings which use similar zoning ordinances to authorize events as permitted uses.

TIMELINE

March 20, 2017	Board of Selectmen & Town Manager to make the following decisions: <ul style="list-style-type: none">• Establish a Patton Homestead Committee to implement this program• Approve Warrant Articles for Homestead operating/capital Fund
Mid-late March	Working sessions with Town Manager, DPW Director, Director of Planning & Inspections to establish scope of renovations within available budget.
April 2, 2017	Make transparent the existing operating budget items for the Homestead and Incorporate the operating budget for the Patton Homestead for the renovation phase (September through December 2017) and the operations phase (January –June 2018) into Hamilton’s FY2018 Budget. The sources can be from current Patton operating cost budget and from the fund for capital expenses.
May 2017	Hire part-time Project Manager for renovation phase or start process to engage architectural service provider to establish bid documents and commence bidding for more comprehensive scope of work.
May – October, 2017	Start & finish renovation & interior work & parking lot
September 2017	Hire part-time Director for the Patton Homestead
September-December 2017	Part-time Director establishes and starts implementing marketing plan
January 2018	Open for events and meetings

SELECTMEN, TOWN MANAGER & TOWN MEETING DECISIONS

The Patton Homestead non-profit will work with the Board of Selectmen, Town Manager, and Finance Committee in advance of April's Annual Town Meeting.

If the Selectmen accept the Patton Homestead non-profits' proposal the following decisions must be made:

- Form a Patton Homestead Committee that reports to the Board of Selectmen on policy matters and that works day-to-day with the Director of Planning and Inspections.
- Encourage Town Manager to hold meetings at the Homestead with the DPW Director, the Director of Planning & Inspections and the PHC to arrive at an alternative renovation budget (Exhibit E) given the identified uses in this recommendation.
- Incorporate Year 1 Patton Homestead operations and renovations into the Town's FY2018 budget
- Support the establishment of a revolving, enterprise or other style fund at April 2017 Annual Town Meeting so that the operating and capital budgets the Homestead are fully transparent and are not comingled with the town budget.

"To see if the Town of Hamilton will establish a fund or provide the Board of Selectmen the authority to establish a fund, by special act of the legislature or otherwise, funded by town appropriations and revenue and grants, generated from or with respect to, the Patton Homestead property, for the purpose of managing, operating and making capital improvements at the Patton Homestead property."

- Move existing funds to the newly created from the Patton Homestead Fund, if appropriate.
- Approve use of existing Patton Homestead funds that were set aside from the CP Berry land sale proceeds to hire the project manager to get renovations staffed and finished.
- The Board of Selectmen must endorse this recommendation to directly manage the Homestead, make it self-supporting, and to embrace an attitude of "Go. Own it. Get This Done for the Benefit of the Town!".

PATTON HOMESTEAD COMMITTEE MEMBERSHIP

We recommend that the Board of Selectmen should consider staffing the committee with at least seven members with a varied set of experiences. The skills and perspectives that would be valuable on the committee would include representation from the following fields: Fundraising, Military, Event Management, Marketing, Tourism, and Management/Finance. It may even be appropriate to have partners represented on the PHC.

The charge from the Board of Selectmen would be that the Patton Homestead Committee should:

- represent the BOS as policy gets implemented at the Homestead and represent issues arising from the Homestead back to the BOS and Town Manager;
- participate in strategic planning for the Homestead and stable;
- recruit and develop training for volunteers;
- take responsibility for fundraising and assist in finding and writing grant requests;
- help the part-time Director with marketing the Homestead and with partner communication;
- help manage the Homestead without demanding too much bandwidth from town management;
- help create operating & capital budgets that would be transparently reviewed by BOS, TM & ATM;
- help keep operations focused on how the Homestead should serve the residents of Hamilton without being a financial burden to the taxpayers.

BENEFITS - CONCLUSION

In 2012 Joanne Patton gifted the historic Patton Homestead to the Town of Hamilton “for the benefit of the Town’s residents.” Town Meeting accepted the gift and since then the Town has repeatedly demonstrated strong support for the property as discussed in the History section.

The Patton Homestead Inc Board of Directors has put forth this recommendation to show that once the Patton Homestead is renovated and the property is managed directly by the Town, with the support from a newly created Patton Homestead Committee, it can generate enough revenue to be a tremendous, self-supporting community asset. The property will enhance the Town’s current connection to the Patton family through Patton Park and the school mascot “The Generals”. The Town will receive \$169,000 annually from Patton Ridge tax revenue and reimbursement for Homestead operating services. This is a significant increase from the \$34,000 property tax revenue received when it was a private residence. The Homestead is not and will not be a financial burden to the Town.

Because the Homestead can become a fully functioning, directly managed public property, Town and community residents will be able to use, schedule, attend and experience various benefits including:

1. A quiet, scenic park;
2. Educational, recreational and cultural programs and events;
3. Community interior and exterior meeting spaces;
4. The Patton archives and artifacts;
5. An event center for up to 80 people in the Homestead or 125 people including the grounds;
6. Access to the Ipswich River

The future success of the Homestead as a community asset, as outlined in this proposal, is dependent on

- the appointment of a Patton Homestead Committee to be involved in renovations and strategic planning for the Homestead,
- the hiring of a part-time Project Manager to oversee renovations (using existing funds),
- the replacement of the part-time Project Manager with a part-time Director at a later date, and
- the establishment of a revolving, enterprise, or other property-specific fund so that all Homestead operating expenses & revenues, all funds from fundraising activities, all grants and all capital expenses are fully transparent in a single location in the annual Town Budget.

With support from the Board of Selectmen for this recommendation and the establishment of a property-specific fund at Town Meeting the Patton Homestead can open its doors for the benefit of the entire town and community in January, 2018.

EXHIBITS

Patton Property Summary Economics	A
Patton Homestead Property Revenue & Expenses – All Sources	B
Patton Homestead Event Revenue	C
Patton Homestead Operating Expenses	D
Renovations – MCC Budget and Proposed	E
Comparable North Shore Properties with Space to rent	F
Patton Ridge Real Estate Tax Revenue (as of June 2016)	G
Letters of Support from Prospective Partners	H
Example Application for Use and Fee Schedule	I
Floor Plans and Layout	J
Photos of Property	K
Parking Plan	L

EXHIBIT A PATTON PROPERTY SUMMARY ECONOMICS

	2018	2019	2020+
Patton Ridge Senior Housing (12 condos)			
Patton Ridge Senior Housing Tax Revenue (FY2017 rate)	144,848	144,848	144,848
Patton Homestead Fund			
Total Revenue from Operations & Fundraising	53,515	119,755	151,315
Total Operating Expenses & Incidental Capital Expenses	-63,294	-91,146	-91,506
Reimbursements to Town of Hamilton	0	-20,000	-20,000
Patton Homestead Net Cash Flow	-9,779	8,609	39,809
Funding From Town of Hamilton	9,779	0	0
Homestead Capital Endowment Fund	0	1,722	7,962
Patton Homestead Fund	0	6,887	31,847
Reimbursement for Town Services	0	20,000	20,000
Net Gain (Cost) of Patton Homestead to Town of Hamilton	135,069	164,848	164,848

EXHIBIT B PATTON HOMESTEAD PROPERTY REVENUE & EXPENSES – ALL SOURCES

Revenue	2018	2019	2020+
Committee Sponsored Lectures & Events	2,500	4,000	4,000
Fundraising Special Events	5,000	10,000	10,000
Grants to sponsor exhibits and programming	1,000	40,000	60,000
Event Rentals	39,015	59,755	71,315
Office/Archive Space rent	6,000	6,000	6,000
Total Revenue	53,515	119,755	151,315
Total Expenses	63,294	111,146	111,506
Net Cash Flow	-9,779	8,609	39,809
Homestead Capital Endowment Fund (20% gift agmt)	0	1,722	7,962
Patton Homestead Operations	0	6,887	31,847
Reimbursements for Town Services	0	20,000	20,000

EXHIBIT C PATTON HOMESTEAD EVENT REVENUE

Event Revenue	Regular Use Fee	70%	50%	2018		2019		2020+	
		Hamilton Resident or Veteran Use Fee	Blended Rate at % Resident or Veteran	#/year	Revenue	#/year	Revenue	#/year	Revenue
Space & Timing									
Small Breakout/Patio Meeting (2-3 hours)									
days	250	175	213	6	1,275	8	1,700	8	1,700
Eve/wknd	300	210	255	8	2,040	12	3,060	12	3,060
First Floor 1/2 day meeting									
days	400	280	340	6	2,040	8	2,720	8	2,720
Eve/wknd	550	385	468	8	3,740	12	5,610	12	5,610
First Floor All-day meeting									
days	700	490	595	6	3,570	8	4,760	10	5,950
Eve/wknd	900	630	765	8	6,120	12	9,180	12	9,180
Exterior									
days	1,000	700	850	4	3,400	5	4,250	6	5,100
Eve/wknd	1,200	840	1,020	4	4,080	5	5,100	6	6,120
Non-tented Weddings	1,500	1,050	1,275	10	12,750	5	6,375	5	6,375
Tented weddings (plus cost of tent rental)	2,000	1,400	1,700			10	17,000	15	25,500
			Event & Revenue Total:	50	39,015	70	59,755	74	71,315

EXHIBIT D PATTON HOMESTEAD OPERATING EXPENSES

Operating Expenses	Sep-Dec 2017	2018	2019	2020+
Personnel				
Director (\$30/hr x 19hrs/wk x 18weeks or 52 weeks)	10,260	29,640	29,640	29,640
Payroll taxes @ 10%	1,026	2,964	2,964	2,964
Part time Assistant (\$15 x 19 x 52)	0	0	14,820	14,820
Payroll taxes @ 10%	0	0	1,482	1,482
Temp help @ \$20/hr * 2yrs/event	0	2,400	3,400	3,760
Employee Related Expenses				
Mileage/conference reimbursement	0	200	500	500
Business Expenses				
Town Fees (liq, vict)	100	100	200	200
Membership Fees	0	0	1,000	1,000
Office expenses	500	500	500	500
Phone/cable/internet	800	2,400	2,400	2,400
Equipment Maintenance & Repair	0	250	250	250
Website maintenance	0	250	250	250
Postage	0	300	300	300
Copier/fax/scan	0	1,800	1,800	1,800
Consultants	0	0	2,500	2,500
Advertising & Marketing				
Exhibit expenses			2,000	2,000
Advertising/Marketing	0	3,000	5,000	5,000
Facility Expenses				
Utilities	0	0	8,000	8,000
Janitorial service (bi-wkly)	0	2,340	2,340	2,340
Janitorial supplies	0	400	800	800
Landscaping services	0	10,000	5,000	5,000
Fundraising				
Direct mail	0	1,500	3,000	3,000
Expenses (food, drink)	400	1,000	2,000	2,000
Town Services				
Reimbursement for DPW and Accounting services	0	0	20,000	20,000
Subtotal Expenses	13,086	59,044	110,146	110,506
One Time Purchases				
Desk, tables, chairs etc	5,000	2,000	1,000	1,000
Furniture other	2,000	1,000		
Computer, software, Quickbooks	2,000	0		
Website Design	1,250	1,250		
Total Expenses	23,336	63,294	111,146	111,506

EXHIBIT E RENOVATIONS

*Please note that the MCC Budget request amounts shown below
have not been vetted for scope/contemporary/local pricing*

**Existing Budget Proposed By Town to
Mass Cultural Council**

**Requested Improvements by
Patton Homestead Non-profit**

Exterior Improvements

\$ 45,000	Roof & Dormers (funding approved by CPA)	(45,000)
132,000	Rework existing windows (88 windows - 21 completed)	(TBD)
75,000	Front Entry/Exit Doors (10 doors)	(10,000)
90,000	Exterior clapboard, siding and woodwork	(TBD)
8,000	Clean exterior brickwork & repointing	(TBD)
22,500	Clean, repair chimney interior & exterior	(TBD)
25,000	ADA Compliant brick entry front sidewalk	(10,000)
	Parking Lot & Sidewalk	(175,000)
<hr/>		
\$ 397,500	Category Subtotal	(\$ 240,000)

Interior Improvements

\$ 36,000	Lighting	(scope to be refined w/focus on first floor)
15,000	Bathroom Fixtures	(scope to be refined w/focus on first floor)
10,000	Flooring & Backsplash	(scope to be refined w/focus on first floor)
20,000	Carpet replacement	(scope to be refined w/focus on first floor)
6,000	Vinyl Flooring	(scope to be refined w/focus on first floor)
	Refinish Existing First Floor Hardwood Floors	(5,000)
	Improve/widen doors to porch/patio	(5,000)
	Caterer's kitchen-style improvements	(TBD)
	Tables (10-20) & chairs (80-100)	(3,500-5,000)
	Interior First Floor Painting	(10,000)
<hr/>		
\$ 87,000	Category Subtotal	(\$ 25,000)

System Upgrades

\$ 15,000	Replace forced hot air system	(scope to be refined - TBD)
4,000	provide fresh air supply to boiler room	(4,000)
2,000	Exhaust fans/ventilation to bathrooms	(2,000)
5,000	Electrical feeder panels	(5,000)
50,000	Fire Alarm System	(scope to be refined - TBD)
7,500	Emergency Lighting	(7,500)
7,500	Emergency Exit Signage	(7,500)
5,000	Backflow preventer	(5,000)
	Central Air Condition for 1 st floor – main area	(5,000)
	Expand existing septic system	(25,000)
<hr/>		
\$ 96,000	Category Subtotal	

Architectural Assistance

45,000	Architect's 15% fee for Specs, Bid documents preparation, etc	(0)
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\$ 667,575 Project Total

\$ 333,787.50	Requested from Mass Cultural Council Grant Request
\$ 45,000.00	Already Funded From Hamilton CPA
\$ 288,787.50	Remainder from Patton Homestead Stabilization Fund

EXHIBIT F COMPARABLE NORTH SHORE PROPERTIES WITH SPACE TO RENT

Wedding & Similar Events *	Capacity	Rental Fees	Ceremony Only	Add'l cost per Hour **
Peirce Farm Topsfield	Indoor 150	Friday \$ 3,000 Sat.\$ 4,200 Sun. \$ 3,600		
Commons 1854 Topsfield	Indoor 200 Outdoor 200	'very competitive'		
Willowdale Estate Topsfield	Indoor 125 Outdoor 240	\$ 1,500 to \$ 8,000	\$750	1,000
Hellenic Hall Ipswich	Indoor 200-240 Outdoor 240	\$ 1,000 to \$ 5,000	\$ 400	700
Glen Magna Farms Danvers	Indoor 125 Outdoor 200	\$ 2,500 to \$ 3,500		1,000
Appleton Farms Ipswich	Outdoor	\$ 3,500 to \$ 4,000 plus \$600 ceremony fee		
Barn at Crane Estate Ipswich	Indoor 120	\$ 3,800 plus \$580 ceremony fee		
House of the Seven Gables Salem	Indoor 75 Outdoor 250	\$ 1,000 to \$ 3,500		
Stevens Estate North Andover	Indoor 100-180 Outdoor 250	\$ 4,650 to \$ 6,450		
Smolak Farms North Andover	Outdoor 250	\$ 3,400 to \$ 4,600		500
Tupper Manor Beverly	Indoor 186 Outdoor 186	\$ 2,000 to \$ 7,000	\$ 500	
King Hooper Mansion Marblehead	Indoor 60-125 Outdoor 60	\$ 700 to \$ 2,100		100 plus facility mgr \$20/hour
Rockport Art Association & Museum	Indoor 200	\$ 2,500		
Union Hall Rockport	Indoor 120-200	\$ 3,000		House manager \$ 25/hour
Hammond Castle Gloucester	Indoor 90-120 Outdoor 120	\$ 2,550 to \$ 2,850	\$ 2,850	950
Gould Barn Topsfield	Indoor 75-99	\$ 2,000		
Patton Homestead (Estimate)	Indoor 75-85 Outdoor 120	\$ 1,050 to \$2,000 weddings \$ 490 - 900 interior events \$ 700 -1,200 exterior events		
Meetings & Similar Events				
Gould Barn Topsfield	Indoor 75-99	Weekday \$ 300 Weekend \$ 700		
Tucks Point Chowder House - Manchester	Outdoor 150	Weekday \$ 275-225 res. Weekend \$ 575-675 res.		
Community House Rockport	Indoor 70-200 2 nd Floor 83-248	\$ 50 residents \$100 non-res \$200 for profit/private		
Union Hall Rockport	Indoor 120-200	\$100 - 250 non-profit \$150 - 500 for profit/private \$ 300 – 600 - 1500 all day		House manager \$ 25/hour
Patton Homestead (Estimate)	Indoor 75-85 Outdoor 120	\$ 250 to \$550		
* Included is allowed setup time of typically 1-2 hours + 1 hour for breakdown for weddings & events ** many have additional charges for facilities managers				

EXHIBIT G PATTON RIDGE REAL ESTATE TAX REVENUE (July 2016)

Patton Ridge		aka 634 Asbury Street						
Unit #	Sale Date	Sale Price	Assessor Valuation as of July 2016	Fiscal Year 2017 Tax Rate: \$16.81	Projected Remaining Value if sold at minimum sales price		Projected Remaining Value if sold at average sales price	
1	May 20 2016	759,292		12,764				
2	July 26 2016	675,000		11,347				
3	U/C		349,200	5,870	11,347	675,000	12,395	737,386
4	U/C		76,300	1,283	11,347	675,000	12,395	737,386
5	U/C		433,000	7,279	11,347	675,000	12,395	737,386
6	July 18 2016	766,243		12,881				
7	Sept 12 2016	703,320		11,823				
8	Nov 14 2016	806,865		13,563				
9	Aug 09 2016	745,331		12,529				
10	Sept 12 2016	675,000		11,347				
11	Oct 31 2016	768,033		12,911				
12	U/C		173,000	2,908	11,644	675,000	12,720	737,386
	Average:	737,386		116,503	144,848	2,700,000	149,070	2,949,542
	Sold	5,899,084						
	Completed or Under Construction	2,700,000	as of July 2016					
	Total	8,599,084						

EXHIBIT H LETTERS OF SUPPORT FROM PROSPECTIVE PARTNERS



Board of Directors

William Boardman
President

Nancy Corns Littlehale
Vice President

Heather Ciriello
Secretary

Thad Steward
Treasurer

Abby Pardee Albrecht
Thomas J. Barrett
Ted Batchelder
Kenneth R. Brand
Stephen Decatur, Jr.
Martha Hale Farrell
Jonathan D.H. Lamb
Sarah Locke
Jeanne Y. Maurand
Brian L. Minich
John Piscitelli
E. Randall Smolik
Jan V. Soolman
Catherine Stramer
Chad Sumner
Ken Wilson

Melissa A. Elmer
Executive Director

284 Bay Road
South Hamilton
Massachusetts
01982
p 978.468.4818
f 978.468.0178
info@communityhouse.org
www.communityhouse.org

Carin Kale
36 Rock Maple Avenue
South Hamilton, MA 01982

Dear Carin,

Thank you so much for the update on your progress with The Patton Homestead that we see as an asset to be enjoyed by many in our community. We are so pleased to learn that your Board of Directors continue to make progress and are dedicated to preserving this important piece of history and wonderful property right here in Hamilton!

The Community House would be delighted to discover opportunities to partner with the Homestead as you begin to plan activity and events. We truly believe "we're better together" and appreciate every opportunity to partner with local organizations, businesses, the towns and our neighbors. We will continue to make ourselves available for guidance, advice, and technical assistance as requested.

Best of luck as you continue to advance your mission. Please keep us posted if there is anything further we can do to support your work!

Kindest Regards,

Melissa Elmer
Executive Director



A Donor & Visitor Supported Nonprofit Institution

February 10, 2017

Board of Selectmen
Town of Hamilton
577 Bay Road
Hamilton, MA 01936

Re: Letter in Support of the Proposal of the Patton Homestead, Inc. Board of Directors

To the Board of Selectmen:

I am writing on behalf of the Wenham Museum to give our formal institutional support to the proposal of Patton Homestead, Inc. for the management of the Patton Homestead property. We believe their proposal is an appropriate next step to ensure the basic preservation and maintenance of the site while granting the widest possible amount of public access to this important cultural resource.

To date, the museum has had a positive working relationship with the members of the Homestead Board. This group of volunteers has demonstrated a high degree of commitment to stewarding the Homestead to the best of their abilities and with limited financial resources. Far too often, the "on the ground" work of preserving local history is carried out by community volunteers such as these, and as a fellow historical organization, we thank them for their dedication, service, and vision in seeing the Homestead's potential.

Wenham Museum hopes to continue its collaboration with the Patton Homestead Board and the Town of Hamilton in order to offer history and heritage-based programming to the community. We are also committed to continuing to offer counsel and friendship to the Homestead Board in the areas of nonprofit administration, program creation and administration, marketing and promotion, and preservation and site maintenance.

Separately, the museum has expressed its interest to the Patton family as a possible future home for the Patton Archives, should their care and keeping within the Homestead no longer remain feasible. This offer is still under consideration by the Patton family.

It is also worth noting that the museum was honored to receive a copy of the RFP from the Town of Hamilton. At the moment, the museum does not have the institutional capacity to play a leading role in the management and administration of the Patton Homestead, especially as conceptualized by the current RFP. Our commitment to local history and

Letter to Board of Selectmen
February 10, 2017
Page 2 of 2

military history in particular will need to be further explored through our current strategic planning process, vetted through our donor base, and carefully considered by our Board of Trustees. In the near future, it is possible the museum could play a larger role in the management of the site. If the Patton Archives should come under the museum's care and if strong collaborations continue, it is possible that fundraising for a museum leadership role at the Homestead could become part of our upcoming Capital Campaign.

In closing, the Wenham Museum gives its full support to the proposal of the Patton Homestead Board. We hope to remain a valued partner to both the Board, the Town, and the community in bringing local history to life for multi-generational families in our region. I would be happy to discuss this letter further with you or answer any questions that you may have.

Thank you for your consideration of this letter and for all you do in keeping our community a wonderful place to live, work, and learn.

Sincerely,



Kristin Z. Noon
Executive Director
(978) 468-2377, ext. 102
kristin.noon@wenhammuseum.org

Wenham Museum | 132 Main Street, Wenham, MA 01984 | 978.468.2377 | www.wenhammuseum.org



Hamilton Historical Society
HAMILTON, MASSACHUSETTS
01936

February 11, 2017

Mr. William Burrige
Patton Homestead Committee
Hamilton, MA 01982

Dear Mr. Burrige,

We at the Hamilton Historical Society would like you to know that we are in full support of the efforts and endeavors of the Patton Homestead Committee.

This treasured old historic home, resident of heroic generals, should be preserved and maintained for future generations of Hamilton residents. Please let us know if there is anything we can do to assist you.

You may contact me at our room in the lower level of Hamilton Town Hall or call me at 978-468-4600.

Yours truly,

Raymond Whipple
President
Hamilton Historical Society

156 Willow Street
Hamilton, MA 01982
February 7, 2017

To whom it may concern;

The Hamilton-Wenham Recreation Board has, on numerous occasions, discussed and approved the use of the Patton Homestead by the Town of Hamilton for recreational and other purposes. The acres of grounds on the estate provide access to the Ipswich River and abutting conservation land, which is a unique and valuable asset to our community.

Steve Ozahowski
Chairman, Hamilton/Wenham Recreation Board

THE MUSARY

*P.O. Box 2041
S. Hamilton, MA 01982
themusary.org
Tax ID # 94-3474813*

To whom it may concern:

Founded in memory of Hamilton native John Ryan Pike in 2008, The Musary, JRP Inc. is a public charity that works to motivate, cultivate and inspire people, especially young people, in our community to get involved in music. Through a one-of-a-kind instrument borrowing program, The Musary provides our community the unique opportunity to experience, learn, and create music like never before - "No strings attached."

In keeping with the goal of giving back to the town of Hamilton, and benefiting its residents with the greatest opportunities, we are looking forward to work with and support the Patton Homestead Non-Profit in their proposal. As an organization with strong community ties, we are very excited to get started to fulfill our mission and vision of what the Patton Homestead could be.

Thank you for your consideration,



Thomas H Jones
Executive Director



The Commonwealth of Massachusetts

HOUSE OF REPRESENTATIVES
STATE HOUSE, BOSTON, MA 02133-1054

BRADFORD R. HILL
ASSISTANT MINORITY LEADER

ROOM 128, STATE HOUSE
TEL: (617) 722-2100

February 8, 2017

Re: Letter of Support for the Patton Homestead, Inc.

To Whom It May Concern,

I write to you today to inform you of my full support for the hardworking members of the Patton Homestead, Inc., a group of community leaders who were given a task like none other to not only protect the history of this incredible family, but also to preserve this invaluable gift to the Town of Hamilton by the Patton Family.

Since the inception of this incorporation, my office has partnered with the members to generate needed funds to devise a plan for this pristine property on a moving forward basis. Additionally, as you may be aware, they have also created a working relationship with the Essex County Greenbelt to ensure that parts of this property remain open space and will be an area for outdoorsman for years to come.

As a student of history I believe one of the most important functions of this group is to keep the history and archives of the Pattons available to the public. Without question the members have done just that.

I do not have to tell you that another important aspect of this group's goals had to do with the economics of the property. Not always an easy endeavor but one that has consistently been handled with the Town's budget in mind with openness and transparency.

In closing, I believe this invaluable group of members has done yeoman's work. I have enjoyed my partnership with the Patton Homestead, Inc. and I look forward to my continuing partnership with them when they are in need of my help.

Sincerely,

A handwritten signature in blue ink that reads "Bradford R. Hill".

Bradford R. Hill
Assistant Minority Leader
Massachusetts House of Representatives



EXHIBIT I EXAMPLE APPLICATION FOR USE

Town of Hamilton
2017 Patton Homestead Application

Date of Application: _____

Group's Name: _____

Contact Person: _____

Mailing Address: _____

Town, State, Zip: _____

Home Telephone#: _____ Cell Phone#: _____

Email Address: _____

Date Requested: _____

Time: (please Circle) 9 a.m. – 2:30 p.m. and/or 3:30 – 9:30 p.m.

What type of function is the rental for? _____

Estimate number of people: _____

Will there be Alcohol Present: Yes: _____ * No: _____

*If yes, then you must purchase liquor liability insurance for your event, name the Town of Hamilton as an Additional Insured to the policy and provide a copy to the Town.

Caterer: _____

A copy of the caterer's license to operate a catering service and proof of insurance naming the Town as an Additional Insured must be received 30 days before date.

Applicant must clean all tables at the end of the event. All trash generated by the function must be placed in the receptacles provided. Please bring your own trash bags and cleaning supplies.

Patton Homestead Rental Fees:

		<u>Residents</u>	
		<u>& Veterans</u>	<u>Non-Residents:</u>
Breakout Meetings	Weekdays (Monday-Thursday)	175	250
	Evenings & Weekends (Friday-Sunday)	210	300
½ Day Meetings	Weekdays (Monday Thursday)	280	400
	Evenings & Weekends (Friday – Sunday)	385	550
All Day Meetings	Weekdays (Monday Thursday)	490	700
	Evenings & Weekends (Friday – Sunday)	630	900
Exterior	Weekdays (Monday Thursday)	700	1,000
	Evenings & Weekends (Friday – Sunday)	840	1,200
Weddings & Ceremonies		1,050-1,400	1,500-2,000

Payment in full is required to reserve any date at Patton Homestead. It is your responsibility to get appropriate paperwork 30 days before your event. Failure to do so may result in cancellation of your reservation. There are no refunds.

Total Amount Due: _____

Signature of Contact Person

Patton Homestead Reservation information

1. Town Resident groups/Municipal Groups: Applications to reserve the Patton Homestead are available October 12th for the following calendar year. To Receive the Town Resident Rate , the applicant must reside in the Town of Hamilton. Municipal groups include town based fraternal organizations, schools, etc.
2. Non-Resident Groups: Applications to reserve the Patton Homestead are available beginning January 1 of the calendar year.
3. Completed applications must be delivered to Town Clerk’s office at Hamilton Town Hall.
4. The Patton Homestead can be reserved from 9:00am -2:30 pm and /or 3:30 -9:00 pm. If available, you may rent both time slots but would pay a fee for each time slot.
5. Reservations will be assigned on a first come, first served basis.
6. No group can exceed _____ people
7. With the rental of the Patton Homestead you have access to fourteen 6’ tables and approximately 90 chairs.

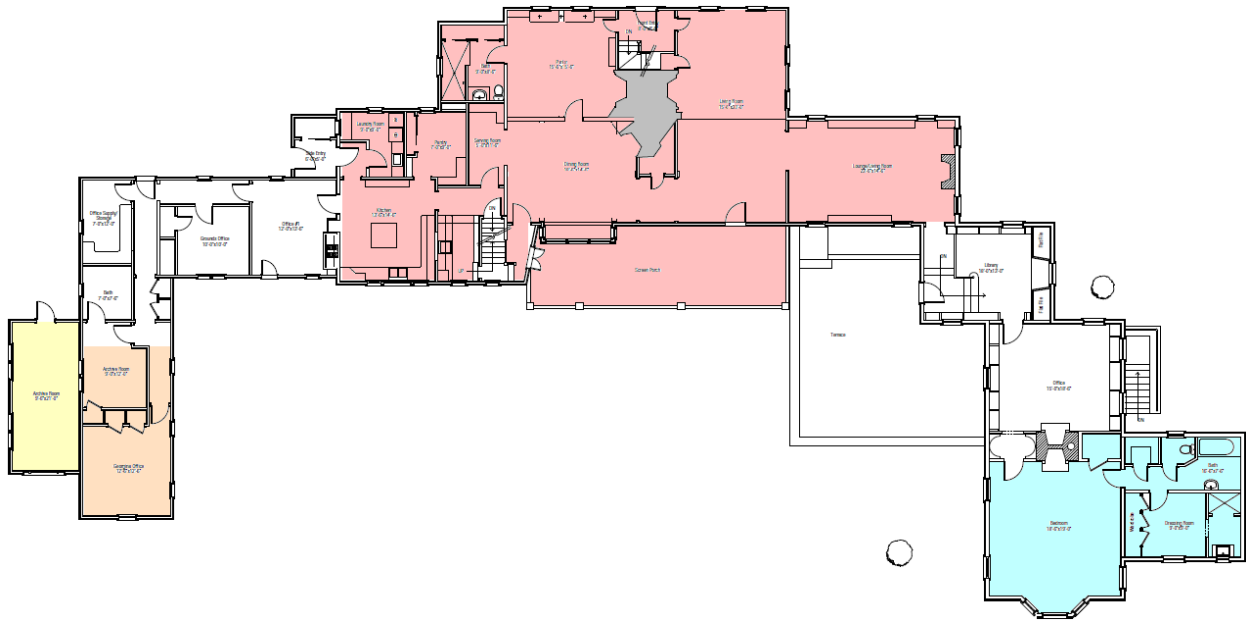
Patton Homestead Rules and Regulations

1. Reservation is for Patton Homestead House, terrace and Lawn directly behind the house.
2. etc

Payment, Paperwork and Charges

EXHIBIT J FLOOR PLANS & LAYOUT

First Floor – Main House



Second and Third Floor – Main House

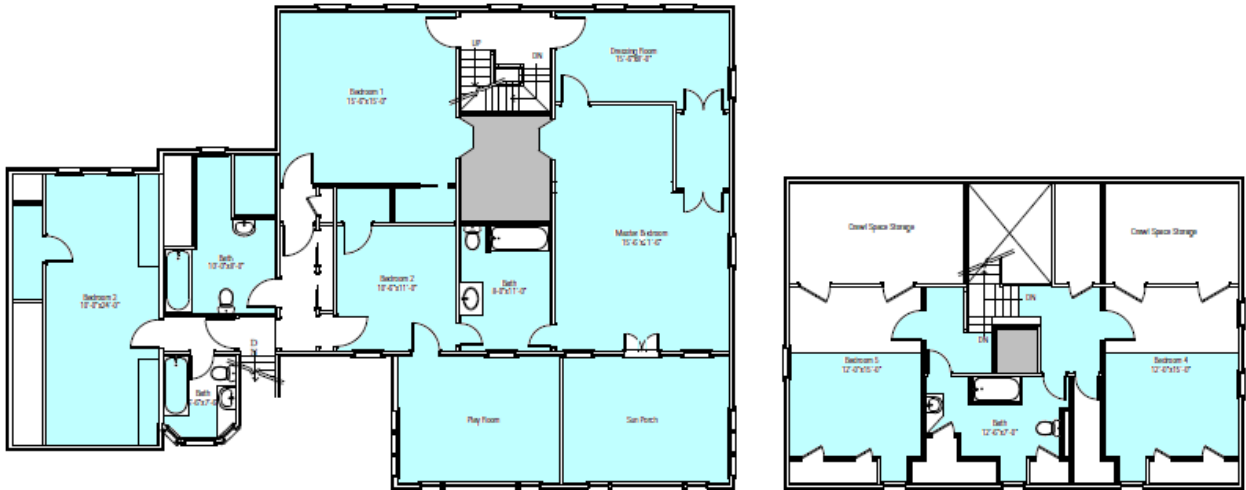


EXHIBIT K SELECT PHOTOS



EXHIBIT L TOPOGRAPHICAL PLANS

