

Sagamore Hill Conservation Project



Request for Community Preservation Funding

*Submitted By:
Essex County Greenbelt Association*

August 3, 2015



August 3, 2015

Ms. Rachel Meketon, Coordinator
Community Preservation Committee
Town Hall
P.O. Box 429
577 Bay Road
Hamilton, MA 01936

Re: Application for Community Preservation Funding for Sagamore Hill
Conservation Project

Dear Ms. Meketon:

Enclosed please find ten copies of an application for eligibility and funding to the Community Preservation Committee for the Sagamore Hill Conservation Project. This is a project that we are very excited about here at Greenbelt, as it offers regionally-significant resource protection, passive recreational potential, amazing scenic views, watershed protection and agricultural production.

Thank you very much for your consideration of this application. I look forward to an opportunity to discuss the application further with the Committee.

Sincerely yours,

A handwritten signature in black ink that reads "Christopher B. LaPointe". The signature is fluid and cursive, with the first name "Christopher" being more prominent.

Christopher B. LaPointe
Director of Land Conservation

Conserving local farmland, wildlife habitat, and scenic landscapes since 1961.





Please be sure to read through the CPA Guidelines for Project Submission prior to completing this application.



Date: August 3, 2015

Project Title: Sagamore Hill Conservation Project

Name of Applicant: Christopher B. LaPointe, Director of Land Conservation

Name of Organization: Essex County Greenbelt Association

Address: 82 Eastern Ave., Essex, MA 01929

Telephone: 978-768-7241 x18

Email: chris@ecga.org

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

CPA Funding Requested: \$1,750,000 Total Project Cost: \$ 5,100,000

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

1. **Project Description:** Please give a detailed project description, including specific objectives.
2. **Goals:** How does this project accomplish the goals of the CPA? (See Guidelines for Project Submission for general criteria)
3. **Timeline:** What is the schedule for project implementation, including a timeline for all critical milestones? Will this be a multi-year/multi-faceted project? If so, the proposal should be submitted in two phases; phase one for the study/engineering, followed by phase two for the project completion.
4. **Budget:** Please provide a full budget including the following information, as applicable.
(NOTE: CPA funds may not be used for maintenance):
 - a. Total amount of the project cost, with itemization of major components.
 - b. Additional funding sources. Please include those that are available, committed, or under consideration including fundraising, other grants, etc.
 - c. Describe the basis for your budget and the sources of information you used, including evidence detailing that the lowest bid has been received.
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.

Please be sure to read through the CPA Guidelines for Project Submission prior to completing this application.

Table of Contents

Page

- 1. Project Description
- 3. Community Preservation Committee General Criteria
- 6. Community Preservation Committee Specific Open Space Criteria
- 15. Timeline, Budget
- 18. Frequently Asked Questions
- 20. Project Maps

**Hamilton Community Preservation Committee
Application for Community Preservation Eligibility and Funding
Sagamore Hill Conservation Project**

Project Description

Overview

Essex County Greenbelt, in partnership with The Trust for Public Land and the Hamilton Wenham Open Land Trust, is leading an effort to protect the long-time conservation priority known as Sagamore Hill in Hamilton and Essex, MA. The 340-acre parcel is a prized outdoor recreational resource that includes an open hilltop landscape offering extraordinary views to the mouth of the Essex River, Cape Ann, and the Atlantic Ocean beyond. Sagamore Hill contains prime farmland soils that support hay production and livestock grazing, and major portions of the property have been identified as core habitat for rare and sensitive wetland habitats and species. 170 acres of the property are located in Hamilton, with the remainder in Essex.

In addition to the 340-acre core project area, Greenbelt is in active discussion with several adjoining landowners interested in donating Conservation Restrictions over their land as match for state funding. Combined, this larger project, centered on Sagamore Hill, will conserve over 500 acres of contiguous land, representing a virtually unprecedented conservation opportunity for this region of Massachusetts. The result will create a corridor of permanently protected land that helps to link interior forest areas of Willowdale State Forest and Bradley Palmer State Park, across Appleton Farms, the New England Biolabs property, and the Miles River to the Manchester-Essex Woods, Crane Beach, and the Great Marsh. The Sagamore Hill acquisition is the critical link to this entire corridor.

Additionally, this conservation project offers an unprecedented opportunity for outdoor recreation and education. Sagamore Hill is not currently open to the public. Once acquired by Greenbelt, the property will become the one of the largest Greenbelt reservations, open free of charge to the public dawn to dusk daily, allowing all to access and enjoy the scenic beauty of the land and its stunning ocean views from the top of the hill. The existing trail network will be improved and formalized, and will lend itself to use by the public and by area schools for a variety of recreational and educational uses.

Acquisition Details and Proposed Project Structure

The Trust for Public Land (TPL) holds a Purchase and Sale agreement to acquire 170 acres of land in Hamilton from Donovan Conservation, LLC for \$4,800,000. TPL holds an Option Agreement to acquire 120 acres of land and a 50-acre Conservation Restriction in Essex from the Essex Land Realty Trust for \$300,000.

The 170 acres in Hamilton have 2,600 feet of frontage on Sagamore Street, and are located in the Residence/Agriculture (RA) zone. The Hamilton acreage is enrolled in Chapter 61A, and if converted or sold for a non-agricultural/ forestry use, the Town would receive a right of first refusal. Because the proposal would not change the use, no right of first refusal is triggered. In fact, one of the major benefits of the proposed approach to the acquisition is that a multi-partner multi-funder program can be developed. This approach, while still requiring a substantial investment from the community, makes it possible for the partners to leverage significant funds from the state and private sources.

The preliminary appraisal has been provided to the CPC, Board of Selectmen, and Town Manager, and further discussion is provided in the budget section of this proposal.

The proposed project structure calls for the Town of Hamilton, possibly jointly with the Commonwealth of Massachusetts Department of Conservation and Recreation (DCR) to acquire and hold a Conservation Restriction over all 170 acres of the Hamilton land, which would permanently protect the property from residential development, would ensure its conservation and availability to the public, and would be a perpetual real property interest. It is further proposed that Greenbelt own the restricted land (the restricted fee title) subject to the Town's Conservation Restriction. Greenbelt would then assume the management and stewardship responsibilities and expenses going forward, including significant start-up costs for a public reservation of this size, and substantial ongoing maintenance responsibilities. The primary reason for the proposed ownership structure is to allow the town and the public to enjoy the benefits of the protected land without burdening the community with land management expenses. As the Conservation Restriction holder, the Town of Hamilton will share responsibility to develop Conservation Restriction language and management plans in cooperation with Greenbelt and will have the right to enforce terms of the Restriction in perpetuity.

Community Preservation Committee General Criteria for Project Review

a. The project's consistency with the Master Plan, Open Space and Recreation Plan, Recreation Master Plan, and other planning documents that have received wide scrutiny, public input, and have been adopted by the town or its boards.

See below for discussion of consistency with plans in the section dedicated to specific Open Space Scoring Criteria.

b. The project's receipt of endorsements from other municipal boards, committees, or departments, interest groups or community organizations.

As of the date of submission of this application, votes of support from various boards and committees are pending. The applicant has met with the Town Manager, the Planning Director, the Board of Selectmen, the Planning Board, the Community Preservation Committee, and the Joint Recreation Board to present and discuss the project. The applicant is meeting with the Conservation Commission on August 12 and will meet with the newly-formed Open Space Committee as soon as they are ready to meet. The applicant hopes to meet with the Finance Committee shortly after submission of this application.

In addition to enthusiastic support from The Trust for Public Land and Essex County Greenbelt, the Hamilton Wenham Open Land Trust (partners with the town on both Donovan Fields and Woods and Chebacco Woods) is an supporter of this conservation effort. Greenbelt has nearly 200 members and donors in Hamilton alone. Greenbelt and Essex County Trail Association are working together to develop plans for the trails on Sagamore Hill.

Several site walks have been held at which numerous members of town boards and committees visited the property, including a walk on August 3 that drew 75 people from across the community.

c. The practicality and feasibility of the project; and the demonstrated ability of the applicant to implement the project expeditiously and within budget and then maintain the improvements afterwards.

Since its founding in 1961, Greenbelt has protected more than 16,000 acres of land across Essex County. Greenbelt operates with a volunteer board of 20 directors, a staff of 8 full-time and 2 part-time employee; 2 AmeriCorps service members and approximately 350 volunteers. More than 4,000 people support our work through membership, donations and activities. Greenbelt has experience across Essex County working on complicated multi-partner, multi-funder conservation projects like this one, and in partnership with The Trust for Public Land, we have the wherewithal and experience to complete this project.

As described in greater detail below, Greenbelt has a stewardship staff, equipment, and resources to maintain the property, provide year-round public access, and to ensure sound stewardship of the resource. Greenbelt currently owns and manages more than 5,000 acres of land across the county and we have deep experience with this work.

The Trust for Public Land is a national, non-profit land trust. Since 1973, TPL has completed 5,471 projects, protecting 3.35 million acres for the public. TPL expertise in conservation transactions, conservation real estate and conservation funding has enabled us to work from Main Street to mountaintop - protecting natural areas, creating parks and playgrounds and maintaining quality of life.

d. The extent to which the project leverages additional public and/or private funds, such as matching funds from neighboring communities for projects that involve shared resources.

As detailed in the budget below, the requested \$1.75M from Hamilton will leverage \$3.35M in non-town money. At the \$1.75M level, Hamilton would be investing less than 35% of the total project budget, and every \$1.00 of Hamilton money invested would leverage \$1.91 in non-town funding. If we are successful with raising additional funding through the likely grant sources, Hamilton's investment would be reduced proportionately and the leverage ratios would become even more favorable.

e. The extent to which the project produces a highly advantageous cost to public benefit value.

The requested town investment leverages significant non-town funding to deliver a substantial return in the way of public recreational and natural resource protection value. The Town will be able to permanently protect an irreplaceable resource (see detailed discussion of resource values below) at a fraction of the fair market value of the land, while attracting substantial non-town funding to the effort.

f. N/A

g. The extent to which the project conserves resources that would otherwise be threatened, or serves a currently underserved population.

The Sagamore Hill property, in its natural state, features a wide variety of critical natural resources ranging from Prime farmland soils to water quality and quantity protection, and important wildlife habitat. If we miss the opportunity to acquire and protect the property now, the landowners will retain the full spectrum of options available to them, including residential development, which would forever change and degrade the resource values of this land.

h. Whether or not the project fulfills more than one CPA purpose.

While primarily an open space project, the Sagamore Hill project also falls within both the recreation and historic preservation categories by virtue of the fact that protection of the property increases the availability of facilities for passive recreational uses (Recreation) and it protects land and historic stonewalls along a designated Scenic Road (Sagamore Street) and clearly provides a public benefit (Historic Preservation).

Community Preservation Committee Specific Open Space Criteria for Project Review

1. Consistency with the Master Plan, Open Space and Recreation Plan, and Article 97

Master Plan: The Open Space and Resource Protection Goals from the Hamilton Master Plan are as follows:

1. Significantly increase the amount of protected open space by preserving large ecologically significant tracts of forest, habitat corridors, and water resources.

In one fell swoop, the conservation of Sagamore Hill would protect approximately 25% of all of the town's existing Chapter 61/A/B land. It is among the largest and most significant unprotected parcels in town. As discussed in detail above with respect to the Open Space and Recreation Plan, Sagamore Hill has extraordinary resource values, creates regionally-significant connections and wildlife corridors, and protects water quality in five distinct sub-basins of the Ipswich and Essex Rivers.

2. Preserve and encourage rural, working landscapes: agricultural and equestrian.

Sagamore Hill contains 75 acres of open fields, which have historically supported hay production and livestock grazing. Conservation of the property would allow those uses to continue. The property has also been used over the years by the equestrian community as part of an interconnected trail network. There are approximately 45 cross country jumps on the land woven into the impressive stone walls that both bound and crisscross the interior of the property. The expectation is that the existing fields would remain open, and many would continue to be harvested for hay. Greenbelt has typically offered farmers very low lease rates (the market rate for hay leases is not particularly high anyway) as a way to encourage and support agriculture in the region, and to allow Greenbelt to focus its stewardship resources on the provision and maintenance of public access.

3. Encourage public use and enjoyment of Hamilton's open space by maintaining and linking the existing trail network, and by providing passive recreation opportunities throughout the town.

Sagamore Hill is part of the existing incredible trail system that our region is blessed with. Although the trails on the property have not historically (regularly) been open to the public, they do connect to the

Donovan Hill Trail, which is a direct link to the Town's Donovan Fields and Woods property owned by the town, and they connect across Sagamore Street into both the Clark and Sears trails (ECTA). Trails on Sagamore Hill would be maintained and expanded. Greenbelt would develop two parking areas along Sagamore Street, and we would install kiosks and mark trails throughout the property. Many Hamilton residents have expressed interest in groomed cross country ski trails, and this property lends itself to that use – Greenbelt is open to exploring investing in that equipment.

4. Protect the capacity and quality of Hamilton's wetland, surface, and groundwater resources.

This project will protect 55 acres of freshwater wetlands, consisting primarily of shrub swamp, with smaller areas of shallow fen and deciduous swamp and two small ponds, and one potential vernal pool on the Hamilton-Essex border.

Wetlands on the property form the headwaters of the Castle Neck River, which feeds into the Essex River, and they flow into the Miles River, which is a major Ipswich River tributary. Ponds, streams, and wetlands flow in several directions, contributing clean water to Chebacco Lake, Alewife Brook, Miles River, and both Soginese creek and the Castle Neck River. These watersheds ultimately contribute to the ecological health and integrity of the 17,000-acre Great Marsh Ecosystem.

5. Assure the endurance of key historic buildings, stonewalls, mature trees and vistas that represent Hamilton and define its visual character.

Although Sagamore Hill has no historic buildings, it boasts an amazing number of intact stonewalls, including the entire 2,604 feet of frontage on Sagamore Street, which is a Town-designated Scenic Road. Impressive interior stonewalls and hedgerows run all over the property along the field edges and through the woods. Incredible mature open-grown trees dot the landscape.

From Sagamore Street, the vista of the property includes about a half mile of stonewall and an uninterrupted wooded edge. Once on the property, the vistas open up into fields, including some very long distance vistas within the hayfields, and of course, the 360-degree view from the top of the hill with the Atlantic Ocean in the distance.

Master Plan: The Open Space Policy, Program, and Capital Investment Actions from the Hamilton Master Plan are as follows (numbering is per the Master Plan):

2. Focus land acquisition investments in areas designated as resource protection priorities: unfragmented wetland, riparian, forest and other significant habitats; water supply and storage areas; agricultural land; and recreation sites and trails.

As discussed above, the Sagamore Hill project addresses all of these identified actions and priorities – 55 acres of wetland, a potential vernal pool, watershed protection to 5 subbasins, BioMap2 Core Habitat, Prime agricultural and forest soils, existing trails and trail connections and incredible passive recreational potential are all encompassed within this conservation project.

3. Work with private property owners and conservation organizations to pursue protection of key open space parcels through conservation restrictions, gifts of land and so forth, and pursue regional conservation projects with surrounding towns.

The Sagamore Hill conservation project again addresses all of these goals. A partnership effort is underway including The Trust for Public Land (national), Essex County Greenbelt (regional), and the Hamilton-Wenham Open Land Trust (local), as well as the towns of Hamilton and Essex and the Commonwealth of Massachusetts, and countless individual and foundation donors. This is a regional project, including Essex and also Ipswich, as several of the additional donated conservation restrictions (as required for the state Landscape Partnership grant) are in Ipswich.

Master Plan: Implementation Capacity (numbering is per the Master Plan):

1. Establish formal relationships between the Department of Planning and Community Development and conservation groups such as Essex County Greenbelt Association, Hamilton Wenham Open Land Trust...the Essex County Trail Association, and the Massachusetts Department of Conservation and Recreation to partner on complementary land acquisition projects for fundraising, grantwriting, negotiation, outreach/ education and land stewardship.

The Sagamore Hill conservation project is exactly what was envisioned and recommended in the Master Plan. The partnership (described above) is coming together around a common priority.

Further, with respect to land stewardship, the proposed project structure (Hamilton investing in a Conservation Restriction, permanently protecting the land, and Greenbelt owning the restricted land) shifts the management and operations burden to Greenbelt and its stewardship team. Greenbelt is experienced in managing properties for public access, agriculture, and environmental

protection. The cost and burden of maintaining the property over time will not be borne by the town in the structure proposed.

Master Plan: Economic Development Goals (numbering is per the Master Plan)

4. Maintain and strengthen agricultural and equestrian activity as part of Hamilton's economic base.

The Sagamore Hill conservation project will protect a significant agricultural and equestrian resource in Hamilton that can support hay and food production, livestock grazing, and equestrian activities. The property represents approximately 25% of the Chapter 61 land in town.

Master Plan: Economic Development Policies (numbering is per the Master Plan)

1. The use of Hamilton's land for crops, hayfields, polo fields, horse trails, paddocks, and pastures is of great benefit to the town and its residents. Agriculture preserves open space, provides jobs, and costs less in town services than it generates in tax revenue...accordingly, Hamilton encourages farming and equestrian activities for economic, fiscal, and quality of life reasons, and recognizes the right to farm. Local policies will not create impediments to farmland protection and new agricultural and equestrian development.

Hamilton's 2009 Open Space and Recreation Plan identifies the following goals:

1. Preserve and enhance open space and scenic qualities.

The proposed project includes the acquisition and protection of 170 acres in Hamilton (plus another 400+ acres in surrounding towns) of highly significant and beautiful undeveloped land, and would ensure free public access for passive recreation.

2. Protect water resources

Wetlands on the property form the headwaters of the Castle Neck River, which is in turn within the Ipswich River and Essex River watersheds. Ponds, streams, and wetlands flow in several directions, contributing clean water to Chebacco Lake, Alewife Brook, Miles River, and both Soginese creek and the Castle Neck River. These watersheds ultimately contribute to the ecological health and integrity of the 17,000-acre Great Marsh Ecosystem.

The conservation of the Sagamore Hill property will be of extraordinary benefit to the region's residents and visitors, and its natural resources. This project will protect 55 acres of freshwater

wetlands, consisting primarily of shrub swamp, with smaller areas of shallow fen and deciduous swamp and two small ponds, and one potential vernal pool on the Hamilton-Essex border.

3. Protect wildlife habitat

The property falls within an area designated as BioMap2 Wetland Core (Least Disturbed Wetland Complexes), Wetland Buffer, Critical Natural Lands Landscape Block, and Critical Habitat for Species of Conservation Concern by the Massachusetts Natural Heritage Program in the 2012 BioMap2 analysis.

A 2015 study by Jim MacDougall of Biodiversity Consulting, LLC, revealed a significant assemblage of bird species. The US Fish and Wildlife Service's "Partners in Flight" assessment of land birds within our region prioritize the importance of conserving habitat for the species in the greatest decline: Bluewinged Warbler, Wood Thrush, Baltimore Oriole, Black-billed Cuckoo, Scarlet Tanager, American Woodcock, all of which are common breeders on this property. and species of both woodlands and shrublands. The second Tier species include: Rose-breasted Grosbeak, Eastern Wood-pewee, Black-and-white Warbler, Hairy Woodpecker, Eastern Towhee and Purple Finch. Tier 3: Bobolink.

Mr. MacDougall reported that his observations in the spring of 2015 revealed 6 singing Wood Thrush, 14 territorial Baltimore Oriole males, 3 singing Blue-winged Warblers, 4 Black-billed Cuckoos, 4 singing B&W Warblers, 5 Rose-breasted Grosbeaks and 12 Eastern Towhees. Those species in those concentrations are a big deal for Eastern Massachusetts. Grassland species were also well represented with 16 male Bobolink and 5 Savannah Sparrow documented as established territories around the hay fields.

Mr. MacDougall identified a further notable asset of the property, which is its location relative to Bradley Palmer State Park, coastal farmlands of the lower Great Marsh in Essex and the wilderness of the Essex Manchester Woods. This property sits as the keystone for linking all these properties together with natural habitat for connectivity. If it were developed, the potential for a linkage between these major ecological nodes would be eliminated forever. With it protected, a case can be made to strive to complete these links by acquisition and proper stewardship to preserve the necessary connectivity of wildlife for the entire region.

This property, in its natural state, connects the watersheds of the Ipswich River to the Essex River and ultimately to the Saw Mill Brook

watershed of Manchester. Those species that use this overland linkage are otter, beaver, fisher, raccoon, and the Eastern Cottontail, frogs, turtles and snakes. Some of the habitat is suitable for New England Cottontail, which would use the same habitat as Blue-winged Warbler and Eastern Towhee. A land bridge for this species from the coastal areas of the Great Marsh to Bradley Palmer State Park, both having large areas of suitable habitat, would expand the potential for linking populations and preserving the potential for this species.

4. Support agriculture and Forestry

The 2009 Open Space and Recreation Plan (referenced in the 2015 Community Preservation Plan) identifies approximately 700 acres of Chapter 61/A/B land in Hamilton that is unprotected. Sagamore Hill comprises more than 25% of the remaining unprotected Chapter 61/A/B land in Hamilton.

Sagamore Hill contains 141 acres of Prime or Statewide Important agricultural soils, and more than 75 acres of open fields. Historically, the land has grown hay and has been used for pasture for livestock. If this conservation effort is successful, that agricultural use would continue, while allowing recreational access.

Sagamore Hill is almost entirely comprised of Prime forest land as established the Department of Natural Resources Conservation at the University of Massachusetts at Amherst. GIS data created for this project followed (where possible) the protocol established in UMass Research Bulletin #705 – Prime Forest Land Classification for Forest Productivity in Massachusetts. These soil classifications indicate very productive conditions on the property for forest growth.

5. Preserve, maintain, and enhance trail systems and passive recreation facilities.

Sagamore Hill contains 2.3 miles of existing trail systems, which consist primarily of well-established farm and woods roads connected seasonally through mowing of trails through hayfields. Trails and roads within the Sagamore Hill property connect directly to ECTA's Donovan/Sagamore Hill Trail, which, connects the Donovan Fields and Woods with Sagamore Street in a loop up and around the hill. The southern half of the trail is located on public land owned by the Town of Hamilton. The northern half of the trail is a public trail easement that crosses through private properties. The single-track trail is mostly wooded and the terrain is relatively steep on either side of the hill. There is a bridge over a small creek that will support horses. There is a cross trail that passes by the USAF Geophysics Lab

Radio and Solar Observatory. An existing woods road on the Sagamore Hill property connects directly to that cross trail and offers a further connection across Sagamore Street to the Clark/ Sears Trails across the Miles River and beyond.

If successful, Greenbelt would develop two gravel parking areas near the Sagamore Street frontage (one at the bottom of the clamshell road, and one at the bottom of Blueberry Hill. Greenbelt would maintain (including plowing) the parking areas, and the public would have access free of charge from dawn to dusk for passive recreational pursuits including walking, trail running, horseback riding, bicycling (ideally on trails segregated from equestrian use to promote safety for both user groups), cross country skiing (perhaps on groomed trails), and snowshoeing. The destination of the property is the height of land, upon which it is possible to construct a viewing platform to enhance the 360-degree views that the property offers.

Article 97 of the Constitution of Commonwealth of Massachusetts: Article 97 of the state Constitution does not identify “objectives” *per se*, but it does affirm the following: “The people shall have the right to clean air and water, freedom from excessive and unnecessary noise, and the natural, scenic, historic, and esthetic qualities of their environment; and the protection of the people in their right to the conservation, development and utilization of the agricultural, mineral, forest, water, air and other natural resources is hereby declared to be a public purpose.”

The acquisition and permanent protection of the Sagamore Hill property is entirely consistent with (and the property would be forever protected by) Article 97.

Receipt of Endorsements from Board of Selectmen, Town Manager, Conservation Commission, other Town Staff:

The Town Manager, Director of Planning, and Board of Selectmen (in addition to the Joint Recreation Board, Planning Board, and Community Preservation Committee) have all been briefed on the project, and many members of those and other boards have visited the property. Project sponsors are on the agenda for the August 11, 2015 Open Space Committee agenda and the August 12, 2015 Conservation Commission agenda. Endorsements will be sought before Town Meeting.

Community Preservation Committee Criteria for Project Review (continued)

2. The extent to which the open space is accessible to the public.

If protected, Sagamore Hill's trails, fields and woods will be open to the public from dawn until dusk every day at no charge. Greenbelt plans to manage the property like we manage our more than 5,000 acres of reservations across the county by developing gravel parking areas, installing kiosks and directional signage, providing maps, and creating and maintaining trails for a variety of trail users. Sagamore Hill has been privately owned and largely inaccessible for years. One of the most compelling reasons for protecting the property is to ensure that the public has the ability to enjoy this amazing place in every season. Greenbelt would add Sagamore Hill to our regular series of events, which include trail runs, festivals, and walks, and maps and property information would be available onsite at kiosks as well as online.

Hiking, wildlife viewing, bicycling, horseback riding, trail running, snowshoeing, and cross country skiing are just a few of the potential uses. The gravel road that connects Sagamore Street to the top of the hill will easily accommodate strollers with all-terrain wheels, and with some work to the road surface, it's not out of the question that motorized wheelchairs could ascend the hill.

3. The Project's ecological, scenic, or recreational value.

The narrative earlier in the application regarding consistency with the Open Space Plan and the Master Plan covers this criteria in depth, but in short, there are few properties on the North Shore that remain undeveloped and unprotected that feature the range of natural resource values, regionally-significant scenic qualities, and public passive recreational potential that this property offers.

4. Whether or not the project is located in areas with limited open space, or areas with essential water resources.

5. Whether or not the project is contiguous with existing protected land or provides linkages with existing trails.

Criteria 4 and 5 should be considered together because they are somewhat at odds with one another. The criteria seem to value contiguity, while also valuing opportunities where little open space currently exists. The two concepts are somewhat opposite of one another. That being said, Sagamore Hill is immediately adjacent to Donovan Fields and Woods (owned by the Town of Hamilton with a CR to the Hamilton Wenham Open Land Trust), and two parcels of Greenbelt land – one in Essex and one in Ipswich. Sagamore Hill is directly across Sagamore Street from Greenbelt's Clark CR, which runs all the way to the Miles River. If successful, Greenbelt will leverage additional land in Ipswich and Essex, which would increase the total newly conserved land to more than 500 acres, and could potentially create a nearly contiguous block of more than 1,000 acres between the Miles River and Western Avenue in Essex.

As previously noted, existing trails on Sagamore Hill connect to ECTA-maintained trails on Donovan Fields and Woods and on the Clark and Sears properties, giving access to the extensive trail systems beyond.

Timeline

The Trust for Public Land (TPL) holds a Purchase and Sale agreement to acquire 170 acres of land in Hamilton from Donovan Conservation, LLC for \$4,800,000. TPL must have funding commitments in place in order to commit to buy the Hamilton land before the end of 2015. TPL holds an Option Agreement to acquire 120 acres of land and a 50-acre Conservation Restriction in Essex from the Essex Land Realty Trust for another \$300,000 (aggregate \$5,100,000). The Essex Option must be exercised before the end of January 2016. In both cases, it is expected that all conservation funding (from the variety of sources enumerated in the budget) would be brought to bear in the summer of 2016.

We anticipate that a \$1,750,000 investment would be bonded over a number of years, but that the full approved amount of funding would be available for a closing in the summer of 2016.

Budget

The Trust for Public Land (TPL) has negotiated an aggregate purchase price of \$5,100,000 with the landowner to purchase 290 acres of land in fee and a 50-acre Conservation Restriction, for a total of 340 acres. Ultimately, the Town of Hamilton would hold a Conservation Restriction over 170 acres, the Town of Essex could hold a Conservation Restriction over 120 acres in Essex, and Greenbelt would hold 290 acres of land in both towns in fee, as well as a 50-acre Conservation Restriction over land that will remain privately owned.

The purchase price was negotiated with the landowners, Essex Land Realty Trust and Donovan Conservation, LLC. Donovan Conservation, LLC was ultimately willing to agree to sell the Hamilton land for \$4,800,000, and Essex Land Realty Trust was willing to sell 120 acres of the Essex land and a Conservation Restriction over 50 acres for \$300,000.

MA Landscape Partnership Program:	\$1,500,000	(application due 09/30/15)
Town of Hamilton CPA	\$1,750,000	(requested 10/03/15)
Town of Essex CPA	\$ 100,000	(requested fall 2015)
MA Dept. of Conservation and Rec.	\$ 250,000	(under consideration)
Foundation & Private Fundraising:	\$1,500,000	(Greenbelt Committed)
Total Requested	\$5,100,000	

We will request \$2,000,000 from the Landscape Partnership Program, but a likely grant award is as shown in the \$1.5M range. If we are successful in securing that funding source near the maximum potential, Hamilton's final investment will be reduced proportionately. In the event that Hamilton votes to support funding for the project but the partners fall short of the funding goal, Hamilton would simply retain its CPA funds and would not have funding at risk. On the other hand, if

project partners exceed our funding goals, we would be able to reduce Hamilton's contribution proportionally.

The funding requested from the Town of Hamilton is less than 35% of the total project cost. At a \$1.75M level, Hamilton would be leveraging \$1.91 in non-town money for every \$1.00 invested.

Appraisal

The Trust for Public Land engaged Jim Monahan (MA Certified General Appraiser #3481) of LandVest (in their consulting capacity) to appraise both the Hamilton and the Essex portions of the Sagamore Hill transaction. LandVest has no brokerage relationship in this transaction whatsoever. As noted elsewhere, the town has been provided with copies of the appraisal report. The value determined by the appraisal for the 170 Hamilton acres alone (dated March 9, 2015) was \$4,850,000, and the total appraised value of the Hamilton and Essex acreage combined was \$5,225,000.

As required by the Massachusetts Landscape Partnership Program and the Department of Conservation and Recreation (both of whom list LandVest as a qualified appraiser on their list of vendors), TPL and Greenbelt will hire a review appraiser to essentially peer review LandVest's methodology and concluded value to ensure that analysis complies with the Uniform Standards for Appraisal Practice. The Town will be listed as a party who can rely on the appraisal.

Other Diligence

The Trust for Public Land hired ESS Group to conduct a Phase I Environmental Site Assessment of the Sagamore Hill property and no recognized environmental conditions were found. That report is available for the Town's use and review.

TPL further ordered a title report on the property, and there were no title defects on the Hamilton land. As is customary, a final title run down and the procurement of title insurance would occur at closing.

Support

As of the date of submission of this application, votes of support from various boards and committees are pending. The applicant has met with the Town Manager, the Planning Director, the Board of Selectmen, the Planning Board, the Community Preservation Committee, and the Joint Recreation Board to present and discuss the project. The applicant is meeting with the newly-formed Open Space Committee on August 11, 2015 and with the Conservation Commission on August 12, 2015. The applicant hopes to meet with the Finance Committee shortly after submission of this application.

In addition to enthusiastic support from The Trust for Public Land and Essex County Greenbelt, the Hamilton Wenham Open Land Trust (partners with the town on both Donovan Fields and Woods and Chebacco Woods) is an enthusiastic supporter of

this conservation effort. Greenbelt has nearly 200 members and donors in Hamilton alone. Greenbelt and ECTA are working together to develop plans for the trails on Sagamore Hill.

Sagamore Hill Frequently Asked Questions

Q: Will conserving Sagamore Hill take property off the tax rolls?

A: Sagamore Hill has been enrolled in Chapter 61A, a tax classification afforded it under state law because of its agricultural use. The annual tax bill for the property has been less than \$500. By conserving the land, we will reduce the need for expensive town services to be extended to a far corner of town and will instead reap the benefits that open space provides.

Q: Can't we sell some house lots on Sagamore Street to offset the cost of the project?

A: While it is true that there is ample street frontage for several frontage lots, the addition of a development component will compromise our ability to secure state funding (the Landscape Partnership Grant) which is dependent on connectivity and total acreage in excess of 500 acres. Selling a handful of house lots has negative ramifications for most of the other funding sources.

Q: What will Greenbelt do with any lease proceeds from agricultural leases that may exist in the future on the property?

A: Greenbelt has historically leased agricultural land for \$1 as a way to help encourage the agricultural economy and to help us maintain and steward important agricultural properties. In fact, rather than making money by owning the Sagamore Hill property, Greenbelt is committing to invest the organization's charitable resources in this land for years to come, at no cost to the town.

Q: Won't the landowners accept less money?

A: The purchase price on the two ownerships (Hamilton and Essex) were negotiated over time with the various principals. John Donovan III, who passed away in the spring, was a principal in Donovan Conservation, LLC, and the deal structure, price, and timing was agreed to and confirmed by appraisal. The price we have before us is the price at which the ownership is willing to sell for conservation.

Q: Can we develop active athletic fields on the Sagamore Hill property?

A: There is ample land area to accommodate athletic fields, but the site work that would be necessary to develop the fields, the cost involved, and the fact that this land is on the edge of town make it a less than ideal choice. Couple that with the fact that the Landscape Partnership Grant will not fund active recreation projects, and a proposal to develop athletic fields becomes difficult.

Q: What if we pass? Won't we have a right of first refusal if the land is sold for development?

A: Yes, the Town would have a right of first refusal if a developer tried to buy the land to convert the use from agriculture, however the town would be constrained by a 120-day statutory window in which to exercise its right, and the other funding sources that we are bringing to bear at this time would not be available. Conserving land via Chapter 61 rights of first refusal is an extremely difficult path, as the statute and its timeframes are inflexible.

Q: Why is the land in Hamilton so much more expensive than the land in Essex?

A: The Essex land has no road frontage in Essex, and the majority of it is wet and parts are somewhat steep, and therefore the relative share of value attributed to the Essex portion of the transaction is much less than the very developable Hamilton acreage.

Q: Have other towns invested their funds in this type of multi-funder multi-partner project?

A: Yes. In fact, this model of collaborative conservation is the norm for large, significant conservation opportunities.

Examples include, but are not limited to:

Maplecroft Farm, Ipswich, 2010.

250 acres of predominantly farmland were protected at a total cost of \$5.1M. The Town of Ipswich invested \$2.07M through their Open Space Bond, the Commonwealth of Massachusetts invested \$1.83M from the Agricultural Preservation Restriction Program and \$700,000 from the Department of Conservation and Recreation. Greenbelt lead a private fundraising campaign and raised \$500,000.

The Town and the Department of Agricultural Resources co-hold a 101.5-acre Conservation Restriction.

The Town and the Department of Conservation and Recreation co-hold a 133.6-acre Conservation Restriction.

The Town and Greenbelt co-hold a 10.8-acre Conservation Restriction.

The underlying land remains privately owned, but is subject to the three Conservation/ Agricultural Restrictions.

Elmwood Farm, Hopkinton, 2013

92 acres of land were permanently protected with a combination of Town CPA funds, private fundraising, a state grant, and the private sale of an existing National-Register-eligible farmhouse. Total purchase price of \$1.8M.

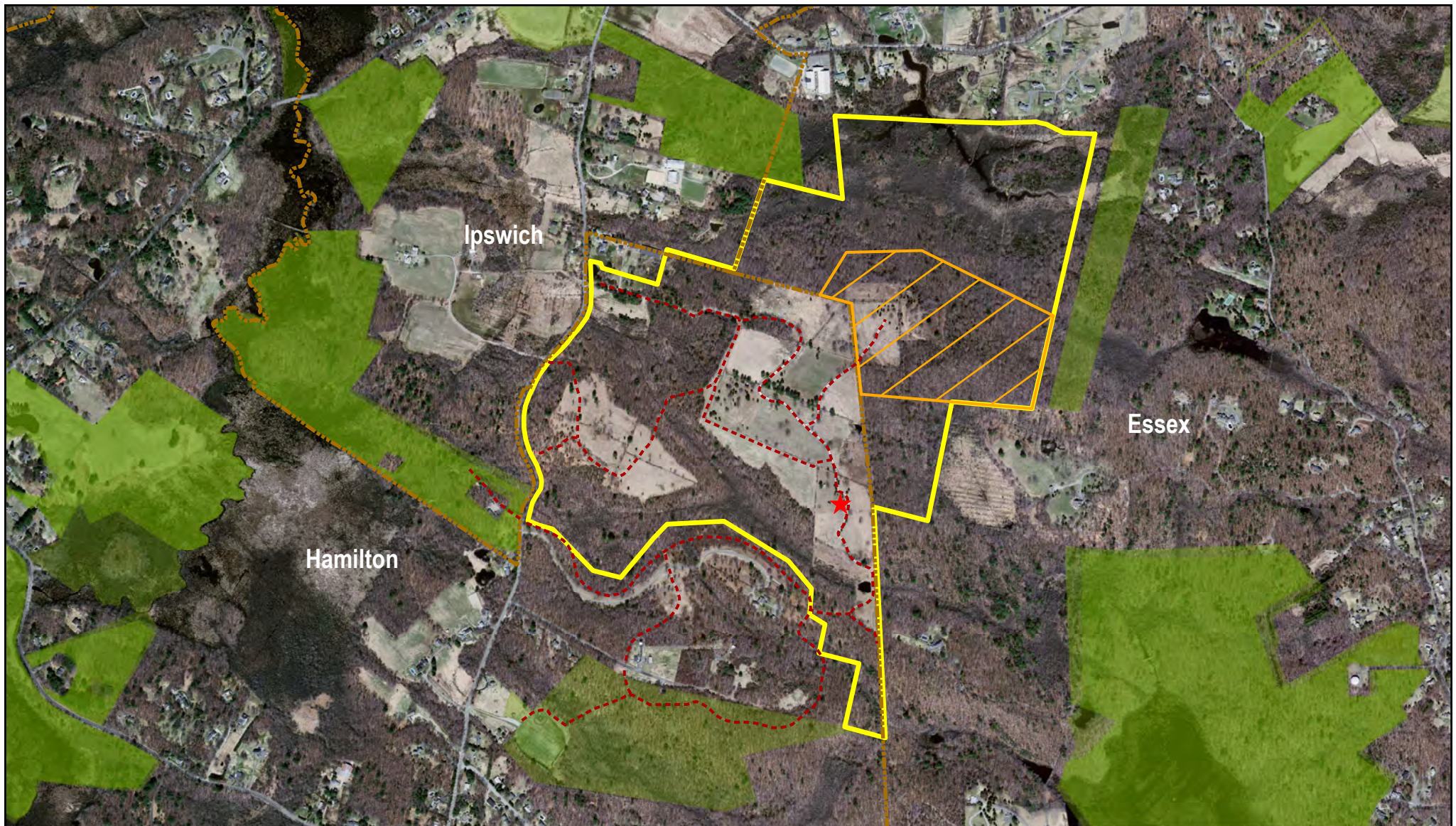
Town of Hopkinton: \$900,000 in CPA funds to acquire 80 acres of land and a 12-acre Conservation Restriction.

State LAND Grant: \$400,000 to accompany the Town's CPA funds.

Private fundraising: \$90,000 in foundation grants

Private sale of existing antique house: \$410,000

Sudbury Valley Trustees hold a Conservation Restriction over the Town's 80-acres of land.



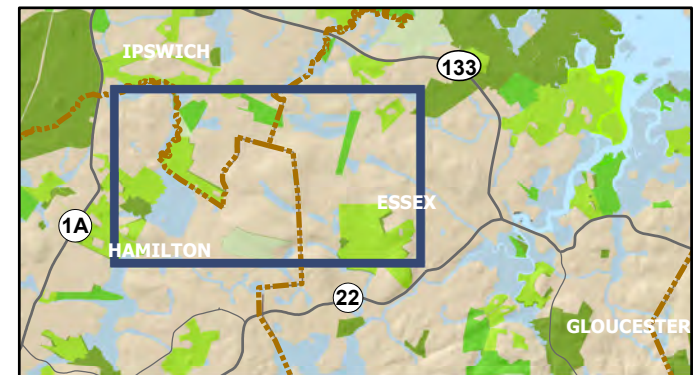
Sagamore Hill Project - Essex & Hamilton ~ 340 acres

- ★ Lookout
- Area Trails
- Town Lines
- Proposed CR Area
- Sagamore Hill Project Area
- Permanently Protected Land



0 1,000 2,000 Feet

Source data obtained from Office of Geographic Information Systems (MassGIS). Orthophotos 2013. Boundaries are approximate and are based primarily on assessors's data and survey plans.
Map produced by Essex County Greenbelt Association
June, 2015.





Sagamore Hill DRAFT

Essex
Hamilton

340 Acres

- Reservation
- Conservation Restriction
- Greenbelt Protected
- Other Protected
- Field
- Trees
- Water
- Wetland
- Stream
- Parking
- Kiosk
- Scenic Viewpoint
- Trail
- Road

