



City of Beverly
Community Preservation Committee
 Planning Department
 191 Cabot Street, City Hall
 Beverly, MA 01915
 (978) 921-6000 ext. 2343 (978) 921-6187 (Fax)

2014 CPA PROJECT FUNDING APPLICATION
Project Description Form

Application and supporting materials must be submitted by May 1, 2014

Project Title: Hale House Masonry Restoration
Project Location/Address: 39 Hale Street
Date: 4/29/2014

Name of Applicant: Susan Goganian
Organization: Beverly Historical Society
Contact Person: same
Mailing Address: 117 Cabot Street
Telephone #: 978-922-1186
Fax#: 978-922-7387
Email Address: sgoganian@beverlyhistory.org

If Different From the Applicant:
Name of Owner: _____
Mailing Address: _____
Telephone #: _____
Fax#: _____
Email Address: _____

- CPA Funding Requested: \$56,500 Total Project Cost: \$ 62,500
- Please circle all CPA Categories to which this project applies (more than one may apply):

Open Space	Community Housing
Historic Preservation	Recreation

PLEASE ATTACH THE FOLLOWING SUPPORTING INFORMATION AND DOCUMENTATION:
 Please type all responses and indicate item number

1. **Applicant/Organization Background:** Please provide a brief description of your or the organization's profile and project history. Explain your ability and capacity to undertake and successfully execute the project.
2. **Project Narrative:** Please provide a thorough description of the project and goals it will achieve. In addition, please address the following items in your narrative, which should not exceed 5 typed pages:
 - a. **Community Need:** Describe what community preservation need this project serves and how the project meets the General and Category Specific Evaluation Criteria as established by the CPC. Please address specific CPC criteria and the definitions listed on the Allowable Uses Chart when answering this question.

- b. **Feasibility:** List and explain all further actions or steps that will be required for completion of the project (i.e. 21E environmental assessments; zoning, planning board, conservation commission permits and approvals; easements or restrictions; subordination agreements etc...).
 - c. **Maintenance & Long Term Preservation:** If on-going maintenance and upkeep is required, please describe how this will be accomplished. Explain specific guarantees that will assure long-term preservation of the project.
 - d. **Maps & Visual Materials:** Please include plans, maps and other visual aids to help describe the project (i.e. USGS topographic map, assessors map, GIS/aerial photo maps, photographs, renderings or design plans etc...).
3. **Budget:** Please fill out the attached Budget Form. Please indicate which expenses CPA will directly fund. Attach supporting documentation as appropriate.
 4. **Project Schedule:** Please fill out the attached Project Schedule Form. Explain each step of the project, time to accomplish the various steps, milestones and project completion date.
 5. If applicable and appropriate, additional information or supporting documentation should also be attached, including but not limited to:
 - a. Natural resource features
 - b. Proof of site control, or plan to obtain control such as Purchase and Sale Agreement, option or deed
 - c. For historic properties or artifacts, a Determination of Historic Significance by the Beverly Historic District Commission
 - d. Historic structure report or existing conditions report
 - e. Letters of support sufficient to document clear endorsement by community members and groups, and where appropriate, by municipal boards, committees, commissions and departments
 - f. Letters from project partners and/or other funding sources
 - g. Evidence that appropriate professional standards will be followed if construction, restoration or rehabilitation is proposed
 - h. Any other information useful to the Committee in considering the project

I certify, under the pains and penalties of perjury, that the information set forth in this application is true and complete to the best of my knowledge.

Applicant's Signature: *Susan J. Hoar* Date: 4/29/14

Owner's Signature: _____ Date: _____
(If Different From Applicant)



1891

THE BEVERLY HISTORICAL SOCIETY AND MUSEUM

117 CABOT STREET • BEVERLY, MASSACHUSETTS 01915-5196 • 978-922-1186
www.beverlyhistory.org

April 29, 2014

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Community Preservation Committee

Beverly City Hall

191 Cabot Street

Beverly, MA 01915

To the Committee:

The Beverly Historical Society is delighted to submit this application to the CPC for funds to begin a multi-year project to restore the building and landscape at Hale Farm, the first phase being Hale House masonry and drainage work. The goal of this project is to implement key objectives of the Society's strategic plan to restore our properties, implement a long-term preservation plan, and create a welcoming green space in downtown Beverly that offers an engaging and enriching educational experience to residents and visitors. The plan includes interpretive signage so that visitors to the property may take advantage of a self-guided outdoor tour during times when the property isn't staffed.

The availability of funds under the Community Preservation Act is a wonderful benefit for this city that will have a transformative impact on our cultural heritage and open space. We appreciate the opportunity to apply for this support.

Please don't hesitate to contact me if you have questions or need additional information.

Sincerely,

Susan J. Goganian

Director

978-922-1186 x204

sgoganian@beverlyhistory.org

1. About the Beverly Historical Society

The mission of the Beverly Historical Society, founded in 1891, is to collect, preserve, interpret and disseminate Beverly's regional history. With a small staff, dedicated group of trustees, and enthusiastic volunteers, the Society's cares for three historic properties and a collection of nearly a million objects and documents, offers research services, guided tours and a robust series of events each year, including lectures, walking tours, school programming, and special events. The word preservation in our mission statement refers to all our documents and objects, including our three historic properties, Balch House, Hale Farm, and the Cabot House. Preservation is an ongoing activity, and one that is challenging for a small institution. As the Beverly Historical Society strengthens its finances and community support to ensure a sustainable future for its sites and collections, it is undertaking multi-year comprehensive preservation projects. Balch descendants are funding much of the work on that property; the Society is hoping that support through the Community Preservation Act will provide significant funding for Hale Farm. As part of a multi-year plan described below, **the Society is requesting \$56,500 in Community Preservation Act Funding to do all needed restoration and repair to the foundation and historic chimneys. Included with that project will be some drainage work to alleviate the standing water at the front of the property that has a negative impact on the structure.** This water problem needs to be solved before we can move ahead with subsequent phases.

Restoration and repair work at Hale Farm will be guided by the Society's Building and Grounds Committee, whose members include an architect, a preservation carpenter, a project manager with extensive experience with historic properties, and an experienced gardener. The Society also draws on outside expertise when needed. All work will be done in accordance with the *Secretary of the Interior's Standards for the Treatment of Historic Properties*. The board of trustees approves all major projects, and the director, with more than ten years of experience with historic property management, will provide direct supervision. The Society's strategic plan, which is a guide for all major endeavors, places great emphasis on restoration of our three historic properties, and ongoing, adequate maintenance.

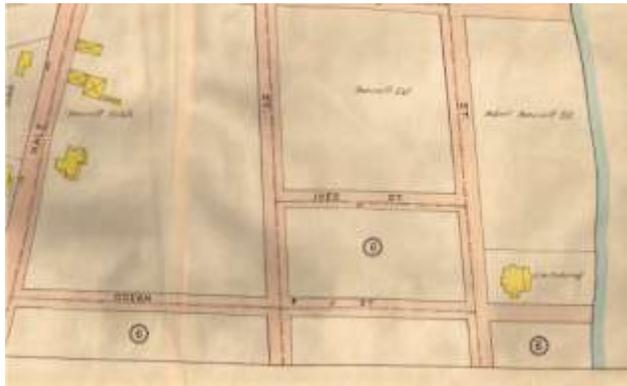


Hale Farm today

2. Restoration of Hale House building and open space

Hale Farm was named by a descendant for the Hale family who first lived in this 17th century house. The oldest part of Hale House has an official construction date of 1694. The gambrel roof addition

facing Hale Street was added in 1745 (or perhaps earlier as Robert Hale Bancroft believed) and there is a 19th century wing built by Robert Hale Bancroft in the 1880s and 1890s. The large lot was once part of a farm of more than 100 acres.



1897 George H. Walker & Co. Atlas

The house was originally the home of the Reverend John Hale, founding minister of the First Church at Beverly. A native of Charlestown, Massachusetts and a graduate of Harvard College, he came in 1664 as “teacher” for the Bass River Side meeting house. He was ordained in 1667 when Salem allowed this section to have its own parish, and with his friends was instrumental in establishing the new town of Beverly in 1668. John Hale played a role in the 1692 Salem Witchcraft trials and is remembered for the book he wrote about that

episode, *A Modest Enquiry into the Nature of Witchcraft*. Reverend Hale served as Beverly’s pastor until his death in 1700. The house was then occupied by the families of his son, Dr. Robert Hale, and grandson, Colonel Robert Hale.

After Colonel Hale’s death in 1767, the property passed to his Ives and Bancroft descendants. For almost 70 years it was leased to tenant farmers who lived in the house and farmed the lands. In 1844 Thomas Poynton Bancroft, a wealthy Boston cotton merchant, decided to convert his Beverly property into a summer estate. His son, Robert Hale Bancroft, continued the renovations, which included rebuilding the old kitchen fireplace and chimney, adding a patio and garden-facing doors and windows, and two phased (first, then second floors) additions housing a kitchen, laundry, servants’ quarters and guest rooms.

Bancroft also established formal gardens, imported and planted the English beech trees which for a long time were a feature of the grounds, and compiled for his children a written history of the house which provides valuable information on when early alterations and projects were undertaken. He died in 1918. During that period, the city acquired the coastline portion of the property, which is now Dane Street Beach. As late as 1924, the Bancrofts still owned multiple parcels, with the Hale Farm property more than seven acres. Surrounding parts of the former estate were sold for development, including Bancroft Avenue, Ocean Street, Ives Street and parts of Dane Street. Sections of the large stone wall that once outlined some of the property still can be found running behind the homes on Bancroft Avenue down to Lovett Street.



Hale Farm, between 1882-1898, as seen from Hale Street.

In 1937, Robert Bancroft’s daughter Eleanor Bancroft sold the house to the Beverly Historical Society; approximately one-third of an acre, containing the three old beech trees, was sold separately to the Beverly Improvement Society, which later conveyed that lot to the Historical Society. The Society has maintained the property since, making necessary repairs and alterations including

replacing the asphalt shingles with more authentic wooden shake; and the addition of heat and air conditioning. Several large trees remain in close proximity of the house, including a rare tulip tree. The house first opened for tours in the summer of 1938 and remains open to convey its rich history to new generations of visitors.



Late 19th century images; note view towards the ocean in center.

The Society is basing its preservation plans on a 2012 Conservation Assessment Plan and an earlier Historic Structures Report (both on file at the Society's library at 117 Cabot Street). From those reports, and extensive discussions with the Building and Grounds Committee and outside experts, we have created a multi-year plan to restore Hale Farm and create a richer interpretive experience for the public.

The multi-year plan for Hale Farm includes the following:

Phase One

Landscape Plan and Masonry Repair

In addition to the work included in this proposal and described below, the Society is seeking foundation funding to create an interpretation plan for the landscape, which will include an overview of the history and use of the property from 1694 to today, the architectural and landscape background and significance, a plan for rehabilitation of the landscape, including necessary tree maintenance, new period-appropriate plantings, and an exterior signage plan.

Phase Two

Exterior Structure Restoration and Repair

This is the largest phase, and includes extensive window restoration, repair or replacement of the main door and entranceway, repair or replacement of rotted clapboards, and exterior painting.

Phase Three

Landscape Restoration and Interpretation

In early 2016, the Society hopes to implement the interpretation plan described above, creating a beautiful and welcoming green space in the neighborhood with interpretive signage that tells the story of John Hale and the Hale property through its history, including its long association with tenant farmers.

Request for CPA funding

The Society requests funding for a project to be accomplished in 2015. Potential contractors, who are well-versed in historic preservation standards, have been approached to create the budget. The project includes:

- Creating a shallow French drain trench along the north and west sides of the 1745 ell and the north side of the main house, including improvements to the window wells.
- Repair of north foundation wall to stabilize by rebuilding from inside (removing and relaying loose stone, chinking and repointing as needed).
- Restoration and rebuilding (where necessary) of four historic chimneys (exterior only). Original brick will be reused whenever possible and repointed with hydraulic lime-mortar mix. A test section will be repointed with the mix for approval before work proceeds. No flashing work is anticipated as the flashing was replaced in 2003-4. The chimneys will be repainted 30 days after masonry work is complete, as is appropriate for this building.



Kitchen chimney showing cracks and separations at mortar joints in top 12 brick courses.

Community Need

A residential neighborhood has grown up around Hale Farm on the land that once belonged to the family. The property is now a green space open to abutters, and available to everyone to enjoy (there is only partial fencing around the yard). In addition to providing open space close to downtown Beverly, the presence of the house has a positive impact on real estate values and is a reminder of Beverly's rich history.

Hale Farm is listed on the National Register for its association with Reverend Hale, and its use over three centuries as the home of the first minister of Beverly, an important site in the witchcraft era, an agricultural property managed by tenant farmers, and a summer home for descendants of Hale, provides a wonderful setting to interpret the rich history of Beverly.

Currently, the property is underutilized by both the Society and the public. The Society has created a multi-year plan to restore the house and property. A weekend of free Shakespeare in the summer of 2013 illustrated that the property is perfect for free cultural programming. During the next few years, and particularly after the restoration plan is completed, the Society plans to increase programming both inside the house and on the property, and provide a welcoming open-air interpretive experience that can be enjoyed when the house is not staffed. Concurrently with implementation of the landscape plan, the Society will form a neighborhood friends group that will be involved in garden care. We hope to establish at least a small vegetable/herb garden that the neighborhood can nurture and harvest.

This project meets the General and Category Specific Evaluation Criteria as established by the CPC in the Historic Resources category, specifically Rehabilitation and Restoration.

The restoration and repair work will comply with Federal Standards for the care of historic property, and will enable the Society to continue to preserve this important property, improve its function, allow safe access for the public, and implement an interpretive plan that will benefit both local



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2014 CPA PROJECT FUNDING APPLICATION
Project Budget Form

- Project Title: Hale Farm Masonry Restoration
- Applicant Contact Information:
 Contact Person: Sue Goganian
 Organization: Beverly Historical Society

SOURCES OF FUNDING		
Source	Amount	Percentage of Total Budget
Community Preservation Act Fund	\$56,500	89
Beverly Hist. Soc. operating funds	\$ 6,000	11
Total Project Funding	\$62,500	

ITEMIZED PROJECT EXPENSES		
Expense	Amount	To Be Funded by CPA? Y/N *Please refer to DOR's Allowable Uses Chart
Masonry repair	\$48,500	Y
Drainage work	\$ 6,000	Y
Painting	\$ 2,000	Y
Project manager	\$ 3,000	N
Staff supervision	\$ 3,000	N
Total Project Expenses	\$ 62,500	

*If the project is a community housing project, please submit a development budget and a sources and uses budget. Also, home ownership projects shall include an affordability analysis, and housing rental projects shall include a five-year operating budget.

Please feel free to photocopy or recreate this form if more room is needed.



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2014 CPA PROJECT FUNDING APPLICATION
Project Schedule Form

- Project Title: Hale House Masonry Restoration
- Applicant Contact Information:
 Contact Person: Sue Gogian
 Organization: Beverly Historical Society

Please provide a project timeline below and describe the various activities, noting all project milestones.

	Estimated Date	Activity
Project Start	4/20/2015	French drain and gutter repair
Project Milestone		Drainage work completed
	5/1/15	Masonry work begins
50% Completion	5/15/15	Masonry work ongoing
Project Milestone	5/30/15	Masonry repairs completed
	6/29/15	Chimneys painted
Project Completion	6/30/15	

Please Note: If the project is approved, the applicant must agree to and sign a Memorandum of Understanding (MOU). Funds will be disbursed based on the conditions of the MOU executed as part of the project award.

Please feel free to photocopy or recreate this form if more room is needed.



**Application for Determination of
Historic Significance**

City of Beverly, Massachusetts
Historic District Commission
City Hall, 191 Cabot Street, Beverly, MA 01915

Project Proponent:	<i>Beverly Historical Society</i>
Name of Project:	<i>Hale House Masonry Repair</i>
Historic Name of Property:	<i>Rev. John Hale House</i>
Address of Project:	<i>39 Hale Street</i>
Year built:	<i>1694</i>
Source for year built:	<i>MACRIS</i>

Please submit the following with this cover sheet:

If *listed*, a copy of the State Register of Historic Places or the Massachusetts Cultural Resource Information System (MACRIS) database showing the property name, address and listing status.

OR (if *not listed*) all of the following:

- If available, a copy of the Massachusetts Historical Commission (MHC) Inventory Form*
- A brief statement describing how the property is significant in the history, archaeology, architecture or culture of Beverly (no more than 500 words)
- Photographs of the project property (no more than 5)

For Official Use Only:

Date received: 2/14/14 BHDC Meeting date: N/A

DETERMINATION

The Beverly Historic District Commission hereby certifies that:

- The property is listed on the State Register of Historic Places
- The property has been determined by the BHDC to be significant in the history, archaeology, architecture or culture of Beverly. Meeting date: _____
- The property is not historically significant. Meeting date: _____

Signed: William B. Finch / 12 Date: 2/26/14
William Finch, Chair

* Copies of MHC Inventory Forms and the State Register of Historic Places are available at the Beverly Planning Department, 3rd Floor City Hall, 191 Cabot Street.

April 27, 2014

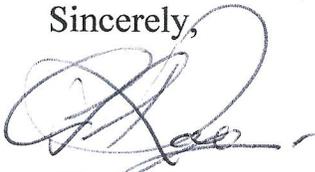
Susan J. Goganian
Director
Beverly Historical Society
117 Cabot Street
Beverly, MA 01915

Dear Sue:

I have reviewed your plan for the restoration of the Hale House and Hale Farm Property and am writing to express my gratitude and support for the initiative in preserving this important historical property. I agree with the sequence priority of the three phases outlined in your plan, my only wish is that the time table could be shortened.

I look at the property every day and it is very apparent that projects you described need to be addressed quickly to preserve the historic value of this property. I'm grateful for your efforts and am writing to show my support and offer my assistance in moving this project forward as soon as possible. Thank you for all you do in preserving the history of our city.

Sincerely,

A handwritten signature in black ink, appearing to read "Charles Roy", with a large, stylized flourish above the name.

Charles Roy
19 Bancroft Avenue
Beverly, MA 01915

April 25, 2014

Community Preservation Committee
City of Beverly
191 Cabot Street
Beverly, MA 01915

Re: Beverly Historical Society's CPA Application for Hale Farm

Dear Members of the Committee:

We are writing in support of the Beverly Historical Society's application for CPA funds for its Hale Farm property. As neighbors of the Farm, we have taken a keen interest in the maintenance and preservation of the house and surrounding property and know that is a valuable cultural, historic and open space resource in the heart of downtown.

We are also aware of the Historical Society's limited budget that needs to stretch to maintain and improve the three historic houses it owns and we could not be more pleased that it has decided to make the Hale Farm its priority with respect to seeking CPA funds. The three-phase plan proposed by the Historical Society is a sensible approach and we encourage the Committee to allocate funds this year (and in future years!) to this project.

The Historical Society has partnered with many City groups, including its neighbors on Bancroft Avenue, to allow use of the property for a variety of events. The three-phase plan proposed for the Hale Farm will allow the property to be used for many more years to come. We strongly encourage funding of Phase One of its Restoration Plan.

Sincerely,



Vickie Caldwell & John D'Amico
Seven Bancroft Avenue
Beverly, MA 01915



April 28, 2014

Sue Coganian, Director
Beverly Historical Society
117 Cabot St
Beverly, Ma 01915

Dear Ms Coganian,

Please accept our enthusiastic support for the plans you outline in your application for a grant from the Community Preservation Act. We look forward to the improvements to the Hale Farm property.

Sincerely,
Jean Costello Moran
James Moran

Beverly Planning Department
Community Preservation Committee
City hall
191 Cabot Street
Beverly, MA 01915

April 30, 2014

Dear Community Preservation Committee,

I am writing to express my full support of the use of CPA funds for the Beverly Historical Society's Hale Farm Restoration and Landscaping Project. The Hale Farm project exemplifies historical and open space preservation that would benefit all of Beverly. CPA funds will help the Historical Society to preserve the structure of the Hale house, clearly establish the grounds as public space, and enhance Beverly's historic profile.

Hale Farm, located in Ward 2, between the Beverly Commons and Dane Street Beach, close to downtown and the soon-to-be designated Beverly Arts District is currently an underutilized historic asset. The structural restoration of the house will help to support tours and further preservation of the Hale Farm story as it relates to Beverly and our region. New signage will clearly invite the public to enjoy the appropriately landscaped space, while interpretive signage on the grounds will tell the important story of John Hale and the Hale Farm tenement farmers, increasing the public's access to this rich history for generations to come.

I am confident that the Historical Society has the capacity to successfully manage the proposed Hale Farm project given that is already an active Buildings and Grounds Committee in place and the site has been previously inspected for digging by Independent Archaeological Consulting. The completion of this project over three years will help the Historical Society to establish all of their open spaces as public spaces; to be utilized for passive recreation and community/cultural gatherings. This will add to the open space acreage in Ward 2 and generate a common interest for the preservation of our historical assets.

The Beverly Historical Society has expertly identified the Hale Farm Restoration and Landscaping project as a priority in their mission to "collect, preserve, interpret, and disseminate Beverly's regional history". This project is pivotal in gaining momentum in a proactive partnership between the public and our historical assets. I respectfully request that the Community Preservation Committee fund the Beverly Historical Society's proposal. Thank you for your consideration. Please feel free to contact me with any questions.

Sincerely,
Estelle Rand
Ward 2 City Councilor
Beverly, MA
978-473-9891

