



**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)

Staff Contact: Amy Maxner amaxner@beverlyma.gov

CPC Website: <http://www.beverlyma.gov/boards-commissions/community-preservation-committee/>

**2015 CPA PROJECT FUNDING APPLICATION
Project Description Form**

Application and supporting materials must be submitted by Friday May 8, 2015 at Noon

Project Title: Hale House Exterior Restoration Project
Project Location/Address: 39 Hale Street
Date: 5/1/2015

Name of Applicant: Susan Goganian
Organization: Beverly Historical Society
Contact Person: same
Mailing Address: 117 Cabot Street, Beverly
Telephone #: 978-922-1186 x204
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: \$276,500 Total Project Cost: \$314,790
- Please mark all CPA Categories and purposes to which this project applies (more than one may apply) - please refer to DOR Allowable Uses Chart:

Open Space:

Acquisition
Creation
Preservation
*Rehabilitation/Restoration Support***

Community Housing:

Acquisition
Creation
Preservation
Support
*Rehabilitation/Restoration***

Historic Resources:

Acquisition
 Preservation
 Rehabilitation/Restoration

Recreation:

Acquisition
Creation
Preservation
Rehabilitation/Restoration

***if acquired with CPA funds*

PLEASE ATTACH THE FOLLOWING SUPPORTING INFORMATION AND DOCUMENTATION:

Please type all responses and indicate item number

1. **Project Narrative:** Please address the following items in your narrative, which should not exceed 5 typed pages:
 - a. **Project Description:** Please provide a thorough description of the project and goals it will achieve.

- b. **CPA Eligibility, Community Preservation Need:** Please describe how the project complies with the CPC's Project Eligibility Criteria and the DOR's Allowable Uses Chart. Please describe the community need the project satisfies. Please address specific CPC Criteria and the definitions listed on the DOR's Chart when answering this question.
 - c. **Project Partnerships & Support:** Please attach commitment letters from funding partners, including in-kind service providers. Please attach other letters of support to document clear endorsement by community members and groups, municipal boards, committees, commissions and departments, etc.
 - d. **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...).
 - e. **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.
 - f. **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.
 - g. **Maps & Visual Materials:** When appropriate, at least one photograph shall be provided with the application. 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...).
2. **Budget:** Please fill out the attached Budget Form. Please indicate which expenses CPA will directly fund. Please attach supporting documentation that substantiates costs (i.e. estimates, quotes, letters of intent estimating value of in-kind services etc...)
 3. **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.
 4. If applicable and appropriate, additional information or supporting documentation should also be attached. ****Note:** If supporting documents are 10 pages or more, an electronic copy (PDF) of said document shall be provided. Supplemental information may include, but not be 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. Evidence that appropriate professional standards will be followed if construction, restoration or rehabilitation is proposed
 - f. 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:  Date: 5/7/2015

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

Project Title: **Hale House Exterior Restoration Project**
Project Location/ Address: 39 Hale Street
Date: 5/6/15

Restoration of Hale House building and open space

As part of a multi-year plan described below, **the Society is requesting \$276,500 in Community Preservation Act Funding to do exterior restoration and repair, including sills, window, clapboards and trim, and painting.** If funds permit, the project will include the restoration of two historic balustrades and additional shutters for the 17th and 18th century sections of the building.



Hale Farm today

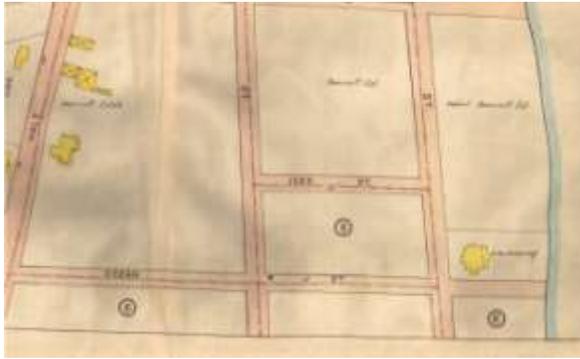
Hale Farm was named by a descendant for the Hale family who first lived in this 17th century house. The oldest part of Hale House has an official construction date of 1694. The gambrel roof addition facing Hale Street was added in 1745 (or perhaps earlier as Robert Hale Bancroft believed) and there is 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.

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.



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

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.



1897 George H. Walker & Co. Atlas

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.

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.

Ideally, the Hale property would have been maintained properly over the last 80 years, but that was not the case. Because of a long period of neglect, the Society does not have the resources to address all the deferred maintenance issues, and the building has been deteriorating. With support from the Community Preservation Act and other donors, we have created a plan to address past neglect and restore the property so that it is the centerpiece of the neighborhood and the cultural icon that it deserves to be.

The Society is basing its preservation plans on a 2012 Conservation Assessment Plan, an earlier Historic Structures Report (both previously received by the CPC) and a comprehensive preservation plan created by Finch & Rose in 2003. 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 as much as possible to its 1905 appearance, for which there is significant documentation.

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

Phase One: Landscape Plan and Masonry Repair

Thanks to Community Preservation Act funds, the Society will complete necessary masonry repairs in 2015. The Danversbank Foundation funded an interpretation plan for the landscape, including 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 window restoration, sill repair, gutter replacement, repair or replacement of the main door and entranceway, repair or replacement of rotted clapboards, and exterior painting after repairs are complete. Note that due to extensive restoration and repair, including selective clapboard replacement, the repainting of the house is an integral part of this project, and not normal maintenance. We hope to include in this phase restoration of two missing balustrades from the Bancroft period of occupancy.

Phase Three: Landscape Restoration and Interpretation

In 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. An interpretation plan has been created, based on extensive research and consultation with neighbors, nearby institutions (like First Parish Church) and the local civic association. A Society member with experience in permaculture is now advising us on specific plantings for the property.

Request for CPA funding

The Society requests funding for a project to be accomplished in 2016. Potential contractors, who are well-versed in historic preservation standards, have been approached to create the budget. The project includes:

- Repair/replacement of sills where needed
- Repair/replacement of exterior trim elements and doors (front door to be restored)
- Replacement of clapboards, where necessary
- Replacement of wood gutters and downspouts with copper, which will be painted
- Replacement of bay balustrade roof and recreation of balustrade according to documentation
- Replacement of 1898 ell roof balustrade according to documentation, and repair to that roof
- Repair/replacement and repainting of shutters for 17th and 18th century sections of house, including two French doors
- Repainting



Please note that the provided budget uses the higher of the two qualified bids. Because pricing cannot be guaranteed a year out, this seemed to be the prudent option. The Society will also seek other funding for this project. In early 2015, approved bidders will be asked to finalize pricing (if CPA funds have been confirmed).

CPA Eligibility, Community Need

This project meets the General and Category Specific Evaluation Criteria as established by the CPC in the Historic Resources category, specifically Preservation, 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 residents and tourists interested in colonial history. Although the public has access currently, this project will encourage more, and more varied, public use of the property.

The 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. If funds permit, a project manager will be utilized as well. 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. The organization is committed to this project and will ensure that all necessary work is completed.

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.

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.

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. Summer weekends of free Shakespeare illustrated that the property is perfect for 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. In 2014, we offered a free open house as part of our holiday house tour weekend, when everyone was welcomed into a beautifully decorated Hale House. 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.

Feasibility

Preparation for this project is relatively simple.

- Extensive discussion with the Society's Building and Grounds committee, with input from others, has determined the areas of needed repair and the techniques to be used. As with any historic repair project, unanticipated repairs may be evident as work proceeds. The Society is committed to the successful and appropriate completion of this phase of the project.
- There is ample room within the boundaries of the property for parking of construction vehicles, so there should be little impact on the neighborhood.
- The Beverly Historical Society will enter into a preservation restriction agreement with the City of Beverly, and obtain all necessary permits.

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 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.

Maintenance and Long Term Preservation

The current project is intended to halt further deterioration of the structure, make repairs where needed, and trigger a more aggressive maintenance plan than in the past. As part of the Society's strategic plan, the Building and Grounds Committee has developed a realistic and appropriate maintenance schedule for Hale Farm, which will be implemented once the multi-phase project described above is complete. Although currently supported by operating funds, dedicated endowments for the properties are being established, to supplement the funds raised annually by the Society. The endowment for our smallest property, the **Balch 4th Century Fund**, was launched in 2014 with a significant pledge from a Balch descendant. An endowment for the Hale property will be established in 2016.



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Community Preservation Committee
 Planning Department
 191 Cabot Street, City Hall
 Beverly, MA 01915
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2014 CPA PROJECT FUNDING APPLICATION
Project Budget Form

- Project Title: Hale House Exterior Restoration Project
- Applicant Contact Information:
 Contact Person: Susan Goganian
 Organization: Beverly Historical Society

SOURCES OF FUNDING		
Source	Amount	Percentage of Total Budget
Community Preservation Act Fund	\$276,500	88
Operating funds/ other funder	\$ 21,800	7
In kind	\$ 16, 490	5
Total Project Funding	\$314,790	100

ITEMIZED PROJECT EXPENSES		
Expense	Amount	To Be Funded by CPA? Y/N *Please refer to DOR's Allowable Uses Chart
Materials	\$ 96,775	Y
Labor	\$179,725	Y
Other (permits, etc.)	\$ 5,000	N
Project manager 24 days @ \$700	\$ 16,800	N
Society staffing 50 days (1hr @ \$30)	\$ 1,500	N
Overhead @ 5%	\$ 14,990	N
Total Project Expenses	\$314,790	

*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.



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Planning Department
191 Cabot Street, City Hall
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2014 CPA PROJECT FUNDING APPLICATION
Project Schedule Form

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

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

	Estimated Date	Activity
Project Start	4/1/16	Sill repairs, selective scraping and paint removal Removal of gutters and deteriorated roof at balustrades; removal of shutters
Project Milestone	4/21/16	Trim repair; exterior washing
		Roof installation; restoration of front door; miscellaneous window repair
50% Completion	5/21/16	Painting of trim elements, repair and restoration work complete
Project Milestone	6/1/16	Painting of siding begins
		Shutter installation; gutters and downspouts installed and painted
Project Completion	6/21/16	

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.



E S S E X R E S T O R A T I O N

~ C U S T O M H O M E R E N O V A T I O N A N D H I S T O R I C P R E S E R V A T I O N ~

HISTORIC PRESERVATION PROPOSAL

DATE: April 19, 2015

JOB NAME: Exterior Restoration

TO: Susan Goganian
Beverly Historical Society
117 Cabot Street
Beverly, MA 01915

Hale Farm
39 Hale Street
Beverly MA

Essex Restoration proposes to provide assistance with the planning and execution of the exterior restoration of Hale Farm as outlined in the Request for Proposals received from BHS on 4/10/2015 and as follows:

OUR SERVICES INCLUDE THE FOLLOWING:

- Project planning / coordination / management
- Participation in periodic project review meetings
- Careful dismantling and archiving of all removed historic elements
- Recruitment of competitive bids by experienced subcontractors for painting
- Provide all materials
- Provide all labor from our team of trained professional preservation carpenters

SCOPE OF WORK:

- Replace wooden gutters and downspouts with half-round copper
- Repair/ replace fascia boards as needed
- Repair 100 lin. feet of sills in 10 locations [and lower portions of adjacent studs/posts]
Including repair of interior wall finishes as required to repair sills
- Preserve/Restore main entry door
- Preserve/Restore 3 window-doors, install bronze weatherstripping
- Replace exterior siding, trim, and sheathing associated with sill repairs
- Replace 1,000 lin feet radially sawn pine clapboards, match length and detailing of ends
- Replace threshold [with white oak] at door to center room
- Replace pieces of corner board at bottom of NE corner of 1745 addition
- Replace skirt board @ threshold @ Entry portico on west side of 1745 addition
- Replace/restore moldings at entry pediment
- Replace/restore eaves crown molding at both ends of north façade of 1745 addition
- Replace/restore crude repairs at base of rakes on west gable façade of main house
- Replace trim boards at base of post at southwest corner of 1898 ell
- Replace rotted trim board above SE 1898 Ell post
- Replace two large areas of rough side out clapboards on south and west sides of main house
- Restore window sash that have failed rail/stile joints
- Replace defective exterior glazing putty on all windows
- Paint exterior of all windows
- Reset dropped exterior sill on left side first floor window on main house adjacent to 1745 entry
- Prep and paint exterior of entire building
- Replace shutters for all window and French doors
- Bay Window: replace roof with flat seam copper
- Bay Window: add balustrade and crown molding as in historic photo
- 1898 Ell Roof: install new balustrade

PRICE: \$281,500

ACCEPTANCE OF PROPOSAL:

The above price, specifications and conditions are satisfactory and are hereby accepted.

Owner's signature: _____

Date: _____

April 22, 2015

Wendy Pearl, Chair
Community Preservation Committee
Beverly City Hall
191 Cabot Street
Beverly, MA 01915

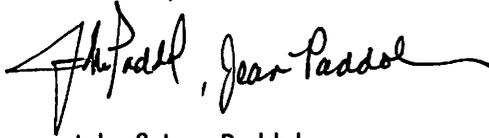
Dear Wendy,

We are neighbors of the Hale Farm and are delighted the property will benefit from CPA funds. It is exciting that work will begin and we are hopeful future funding will help to complete restoration of this beautiful property.

Over the years we have witnessed residents enjoy touring the building followed by picnics and playtime.

The Hale Farm is truly one of Beverly's treasures.

Sincerely,

A handwritten signature in black ink, appearing to read "John & Jean Paddol". The signature is written in a cursive, flowing style with a long horizontal flourish at the end.

John & Jean Paddol
32 Hale Street
Beverly, MA 01915

May 6, 2015

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 strongly encourage the Committee to allocate funds this year toward Phase Two of 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 property is adjacent property to the Common and is one of the many gems of Beverly between Cabot Street and the beach. Using CPA funds for its preservation and enhancement will benefit the City's efforts to develop and enhance the downtown neighborhood as a cultural destination.

Please vote to allocate CPA funds for Phase Two!

Sincerely,

 Vickie Caldwell



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



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
William Finch, Chair

Date: 2/26/14

* 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.