

# Sweetwilliam Farm Preservation

Application for CPA Funding  
Upton Open Space Committee

With Assistance from  
The Sudbury Valley Trustees  
and Metacomet Land Trust

# Sweetwilliam Farm

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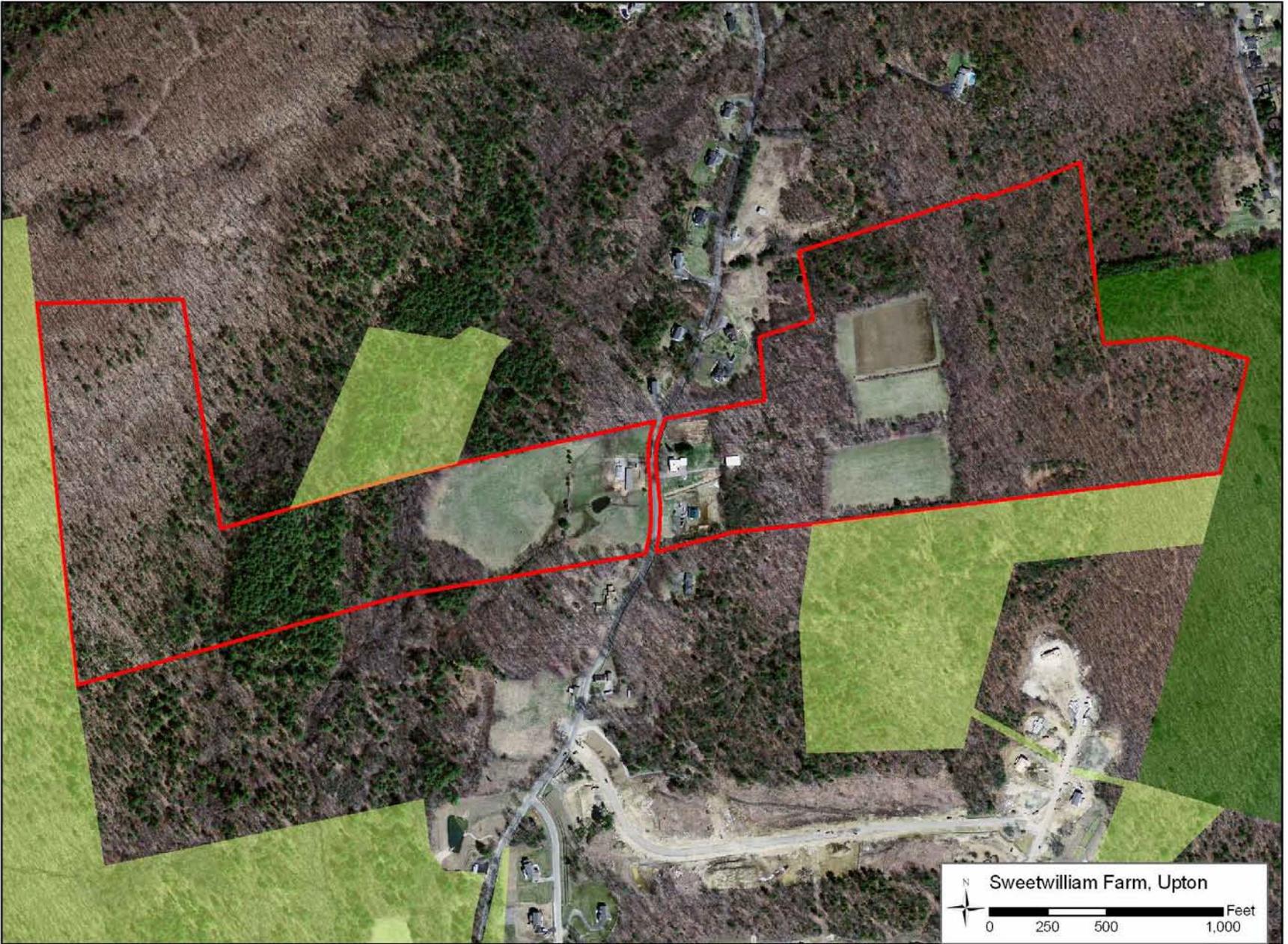
- 92 acres off of North Street – includes pasture, hay fields, crop land and forest
- Spectacular view
- Abuts Upton State Forest and Warren Brook Conservation Land
- Links Warren Brook to Upton State Forest
- One of Upton's few remaining farms
- Provides local produce and eggs to over 100 subscribers under Community Supported Agriculture (CSA) program
- Farmed almost continuously since 1750 – the first 150 years by relatives of Eli Whitney

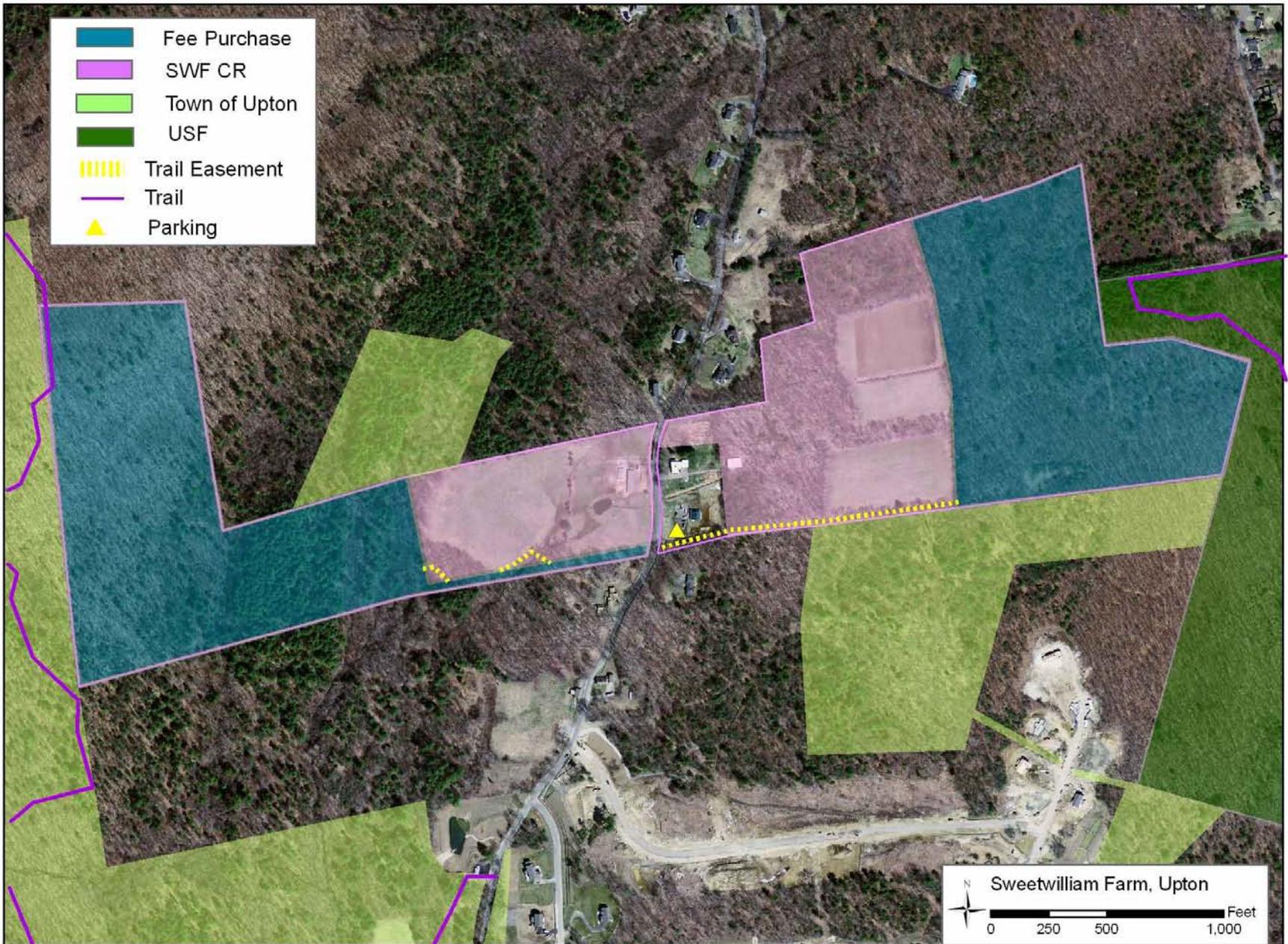
# Sweetwilliam Farm Preservation Plan

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- Preservation through direct purchase of part of the farm and purchase of a Conservation Restriction to protect the rest of the property
- Trail Easements and Parking Provided







**Alternative 5**

# Sweetwilliam Farm Benefits

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- Scenic Resource
  - Preserves one of Upton's most well-known and loved scenic views and helps preserve its rural character
- Passive Recreation Resources
  - Adds a one mile trail with convenient access and exceptional views
  - Enhances the value of Warren Brook and the Upton State Forest by connecting the trails in those parcels and providing another point of access
  - Key component of town-wide trail network
  - Provides access to currently land-locked piece of town-owned land
- Cultural and Historical Resources
  - Preserves one of Upton's few remaining farms and a local CSA
  - Great opportunity for interpretative trail – the farm's history is representative of Upton's and the current landscape is representative of Upton's historical landscape
- Natural Resources
  - Headwaters of Warren Brook
  - Mapped by MA NHESP as rare species and Biomap habitat
  - Part of Mendon-Whitehall-Warren ACEC

# The View From North Street

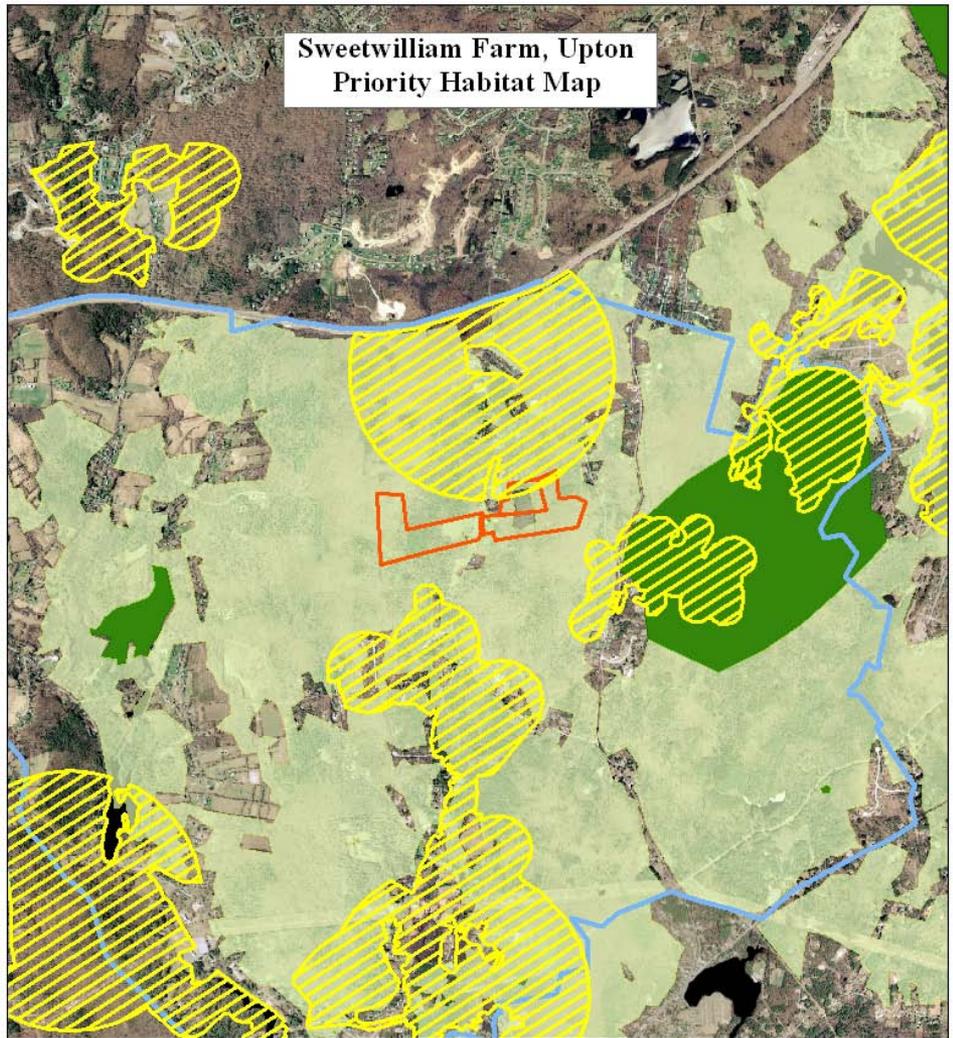


# Natural Resources



- 80 percent forested
- Headwaters of Warren Brook
- Adjacent to 100's of acres of preserved land
- Mapped as Natural Resources Priority Area by Dodson Study
- Mapped by MA NHESP as an area important to protecting the State's biodiversity and as a rare species habitat
- Within Miscoe-Warren-Whitehall Area of Cri Environmental Concern (ACEC)

# Sweetwilliam Farm, Upton Priority Habitat Map



### Legend

-  Sweetwilliam Farm
-  ACECs
-  NHESP BioMap Supporting Natural Landscape
-  NHESP BioMap Core Habitat
-  NHESP Priority Habitats of Rare Species

0 0.2 0.4 0.6 0.8 Miles



June 30, 2010

# Cultural & Historic Resources

Typical Upton farm with a well-known history and link to significant historical figure

- Land originally purchased by Eli Whitney's grandfather, Nathaniel Whitney, and given to his son, Ephraim Whitney Sr.
- Farmed by Ephraim and his descendants from 1750 to late 1800s
- Farm was typical of an Upton farm – about 100 acres with pasture, hay fields, crop land, orchard, wood land, stone walls and cart paths
- We know a lot about the people and the land:
  - Ephraim Sr. and his son, Ephraim Jr. active in town affairs
  - Ephraim Jr. served in the Revolutionary War
  - Whitneys appear in Reverend Parkman's diary
  - Life history of Jemima Whitney at MA Historical Society
  - Wills in Probate Records and detailed Whitney family genealogies
- Current landscape is a good example of Upton's historical landscape
- Part of potential North St. historic district - two other Whitney family homes with  $\frac{1}{4}$  mile

# Cultural & Historic Resources



- Historic Whitney Farmhouse
- Two other Whitney homes within  $\frac{1}{4}$  mile
- Potential Historic District

# Cultural & Historic Resources



Historic Landscape



# Agricultural Resources

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- 20 acres of Hay Fields & Pasture
- Prime Agricultural Soils
- Active CSA

# Agricultural Resources

- Upton was once a farming community with dozens of active farms.
- 387 acres of agricultural land and pasture remains but almost none is protected.
- MA Audubon ranks Upton 297 of 351 towns in agricultural land preserved.
- The town owns about 17 acres of agricultural land at Stefans Farm and 6 acres off North Street. None of this land is permanently preserved for agriculture.



*Former Amato Farm*

# Sweetwilliam Farm Store



# CSA and Education/Outreach



# Passive Recreation



- One mile trail linking Upton State Forest and Upton's Warren Brook Watershed Conservation Area
- The SWF link would join existing trails in Hopkinton and Grafton
- Parking at store



# West Side – View Towards North St.



# CPA Application

# Description of Project

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- Purchase in fee simple of the forested east and west ends of the property and a strip of land for a trail along the south side of the west side pasture (about 60 acres)
- Purchase of a Conservation Restriction (CR) on most of the rest of the property (about 28 acres)
- Excluded from the fee-simple purchase and the CR:
  - Approximately four (2) acre area around the farmhouse and the store. The store lot could be converted to a residential lot by the owner.
  - A three (3) acre house lot on the east side of North Street between North Street and the hayfields. The location will be subject to approval by the Upton Planning Board and Conservation Commission.
- Grant of easements for:
  - Trail easement through the CR protected property and the store property to link the town-owned east and west parcels
  - Public parking on the store lot (5 spaces)
  - Vehicular access by the town through the CR protected land to the town-owned parcels for forest management, trail maintenance, and emergencies
- CR to be held by Sudbury Valley Trustees and /or the Upton Conservation Commission
- Trail across the property (including a fence separating the trail from the pasture) connecting the property to Upton State Forest and the Warren Brook Conservation Areas will be created by the Upton Land Stewardship Committee.
- Trails and fence on the town-owned properties and trail easements will be maintained by the Upton Land Stewardship Committee
- Town-owned land will be open to passive recreation and hunting.
- Subject to town meeting vote, the town-owned land will be known as the Whitney Conservation Area.

# Description of Sweetwilliam CR

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- Prohibits activity on the west side that will impair the view from North Street.
- Requires the pasture and hayfields to be maintained in their current state as open (non-wooded) agricultural land.
- Prohibits the removal of stone walls.
- Permits the continued use and maintenance of the cabin on the east side and the modest expansion of the garage, greenhouse and barn for agricultural use, with applicable approvals and permits from town boards and the Conservation Commission.
- Permits timber harvest under approved forest management plan.
- Permits subdivision of the CR protected property
- Provides for a trail easement through the CR protected property
- Provides vehicular access by the town to the town-owned lands through the CR protected property
- Prohibits public access to the hayfields on the east side during the spring and summer to prevent damage to the hay or other crops (public access during the fall and winter will probably be permitted.)
- Requires a fence between the trail and the west side pasture. The fence must be maintained by the Town (it will be maintained by the Upton Land Stewardship Committee).
- Hunting on the CR protected land allowed only with permission of the owner.
- Upton Land Stewardship Committee will develop and implement a management plan for the CR protected land (and the lands purchased in fee-simple.)
- CR will be monitored by the Upton Conservation Commission and the Sudbury Valley Trustees.
- Town-owned lands will be managed by the Upton Land Stewardship Committee.

# Conservation Restrictions

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- Common tool to preserve land (MGL Chapter 184, Sections 31 to 33)
- > 70,000 acres in protected in MA since 1979 with CRs
- Binding Legal Document approved by state and recorded at Registry of Deeds
- Owner conveys partial interest in the land to a qualified private or public agency
- Owner agrees to forgo future use and development of property as described in the CR
- Future owners are bound by the restriction
- Owner continues to use the property and pay taxes

# Recent Land Protection Projects with Conservation Restrictions

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- Chestnut Hill Farm (2006)
  - 109 acres protected by CR purchased by Town of Southborough; 22 acres protected by CR and deed restriction purchased by SVT
  - All the land remains privately owned
- Nobscot Hill Boy Scout Reservation (2008)
  - 303 acres Protected by CR purchased by Framingham and Sudbury
- Pell Farm (2009)
  - 150 acres purchased by Town of Grafton
  - 25 acres protected by CR and sold to a new owner.

# Sources of Funding

- CPA Fund
- \$500,000 LAND Grant
- Private Donations and Grants (minimum \$95,000)

# Budget

Item	Estimated Cost - Funded by CPA	Estimated Cost - Funded by Others	Notes
<b>Costs</b>			
Land/CR Acquisition	\$ 1,275,000.00	\$ -	
Title Search	\$ 500.00	\$ -	
Environmental Baseline Study	\$ 1,500.00	\$ -	For land acquired in fee simple
Closing Costs	\$ 1,500.00	\$ -	Includes Registry recording costs
Survey	\$ 10,000.00	\$ -	Includes installation of bounds
Baseline CR Report	\$ -	\$ -	Prepared at no cost by Upton Land Stewardship Committee
Signage	\$ -	\$ 1,000.00	Materials only - labor provided by ULSC
Trails and Fencing	\$ -	\$ 5,000.00	Materials only - labor provided by ULSC and others
CR Endowment	\$ -	\$ 10,000.00	Funded by grant to SVT
Stewardship Endowment	\$ -	\$ 5,000.00	Trust fund held by Conservation Commission
<b>Total Cost</b>	<b>\$ 1,288,500.00</b>	<b>\$ 21,000.00</b>	
<b>Reimbursements</b>			
LAND Grant	\$ 500,000.00		
Other Grants/Donations	\$ 74,000.00		
<b>Total Reimbursements</b>	<b>\$ 574,000.00</b>		
<b>Net Cost to CPA</b>	<b>\$ 714,500.00</b>		

## Eligible for Community Preservation Act funding according to the requirements described in the CPA legislation

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- Meets definition of “open space” as defined in the Act:
  - "Community preservation", the acquisition, creation and preservation of open space, the acquisition, creation and preservation of historic resources and the creation and preservation of community housing.
  - "Open space", shall include, but not be limited to, land to protect existing and future well fields, aquifers and recharge areas, watershed land, agricultural land, grasslands, fields, forest land, fresh and salt water marshes and other wetlands, ocean, river, stream, lake and pond frontage, beaches, dunes and other coastal lands, lands to protect scenic vistas, land for wildlife or nature preserve and land for recreational use.

## Protected Open Space

(Source: MA Audubon "Losing Ground" 2009 Report)

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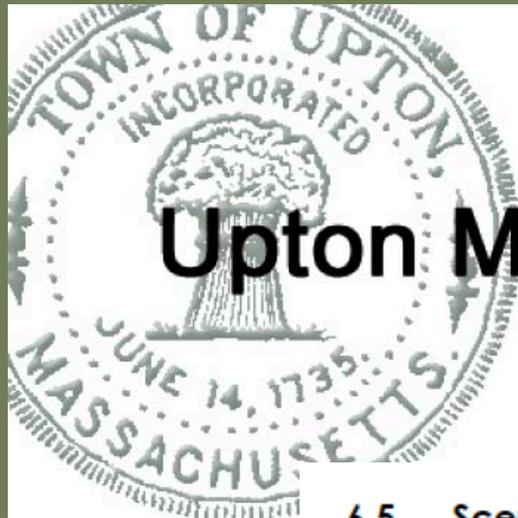
- Upton has 2800 acres of protected open space - including Upton State Forest
- 20.1 % of town is protected open space
- 21.2 % of Worcester County is protected
- Upton ranks 148th of 351 MA towns in land protection

## Consistent with the Upton Master Plan, Open Space Plan and other planning documents that have received wide scrutiny and input and have been adopted by the town

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- **Consistent with Vision Statements from the Master Plan:**
  - “Upton will continue to have the look and feel of a New England village as it continues to develop.”
  - “Upton residents regard open space, recreation, scenic vistas and natural resources preservation as essential elements that are needed to maintain the health and well-being of the community.”
- **Consistent with Open Space Plan goals:**
  - Preserve Upton’s rural, small-town character
    - Encourage the preservation of Upton’s remaining farmland and working farms
  - Preserve open space for environmental and water supply protection
    - Work with Metacomet Land Trust, Sudbury Valley Trust and other partners on open space acquisition projects
  - Preserve cultural and historical resources
  - Expand and improve active and passive recreation opportunities
    - Connect, develop and maintain a town-wide trail system
- **Protects North Street corridor identified in Dodson Open Space study**

# Preserve the essential character of the town as described in the Master Plan



## Upton Master Plan

Adopted July 2005

### 6.5 Scenic Resources & Unique Environments

#### 6.5.1 *Inventory of Scenic landscapes*

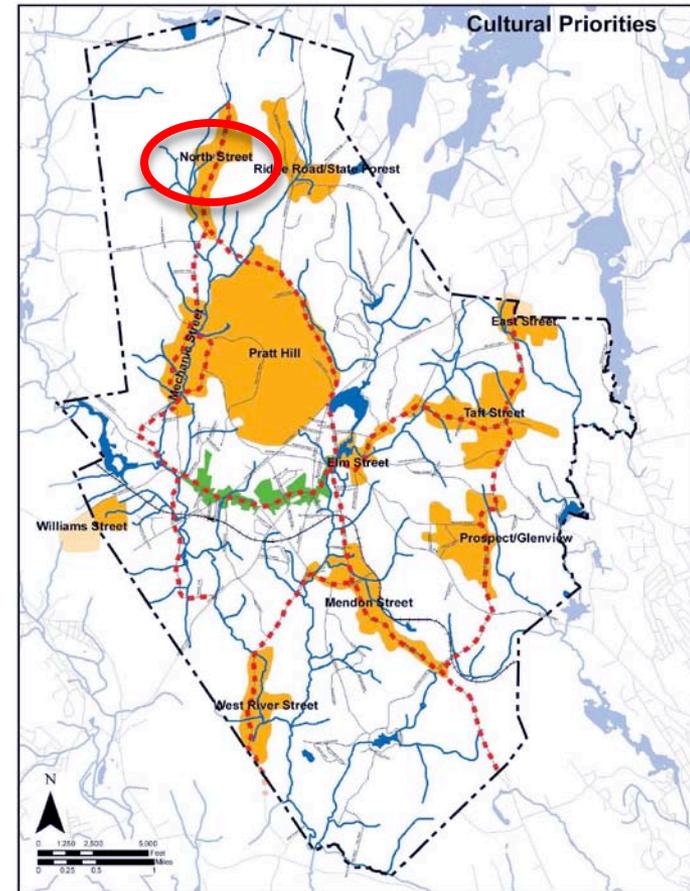
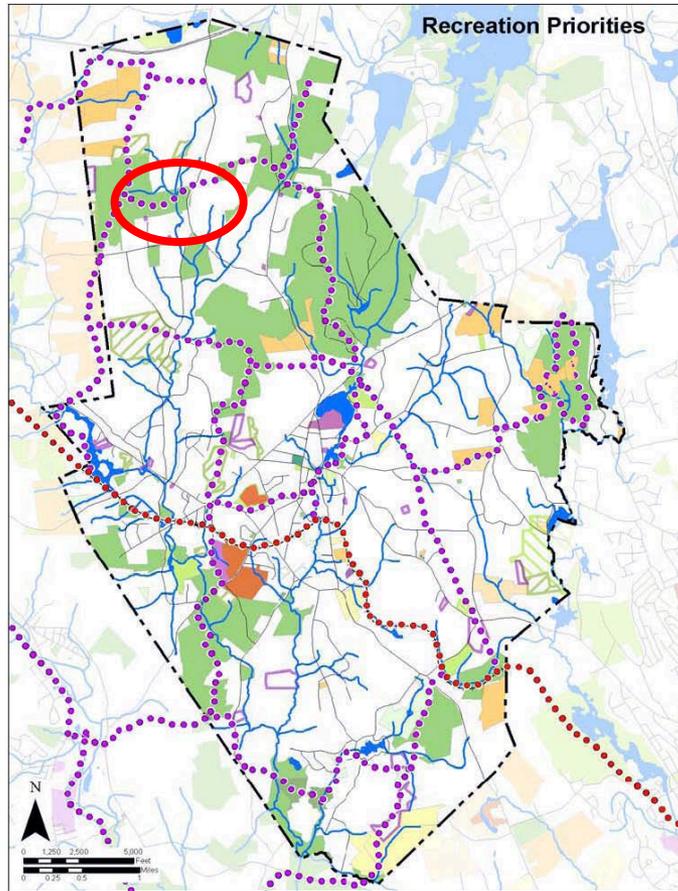
There are many scenic landscapes within Upton. Here are brief descriptions of the landscapes with special distinction.

##### North Street

At the town border with Westborough (near the Mass. Pike), North Street travels southward for 2 1/2 miles and ends at Westborough Road. The road is very narrow, hilly, twisted and lined heavily with woods. The road opens up to a wonderful pasture that looks down into the Warren Brook Watershed. Here one passes three unique 18th century houses that are in good repair. This road offers a beautiful old New England setting.



# Dodson Open Space Study



# 2007 Dodson Study Recommendations

## **Townwide Preservation Priorities**

T1. Pursue conversion of Grafton & Upton Railroad to a rail trail.

T2. Develop a townwide loop trail.

T3. Pursue conservation of “owner unknown” properties throughout town.

## **Historic and Scenic Priorities**

H1. Protect historic district from Elm Street to West Upton.

H2. Protect scenic roads, stone walls and special trees.

H3. Preserve CCC buildings in Upton State Forest.

## **Open space and Watershed Protection Priorities**

W1. Designate Stefans Property as conservation area and protect adjacent properties.

W2. Link protected lands in Southeast Upton.

W3. Expand Warren Brook Conservation Area.

W4. Protect Area of Critical Environmental Concern.

W5. Fill in Peppercorn inholdings.

W6. Protect land abutting State Forest along Westboro and Hopkinton Roads.

## **Neighborhood Preservation Priorities**

N1. Revitalize Milford Street.

N2. Protect Mendon Street/Grove Street corridor and woods along railroad

N3. Protect scenic North Street

N4. Protect scenic Taft Street and Christian Hill Road fields.

N5. Protect West River district

N6. Protect Ridge Road and State Forest area.

N7. Protect Warren Brook corridor along Mechanic Street.

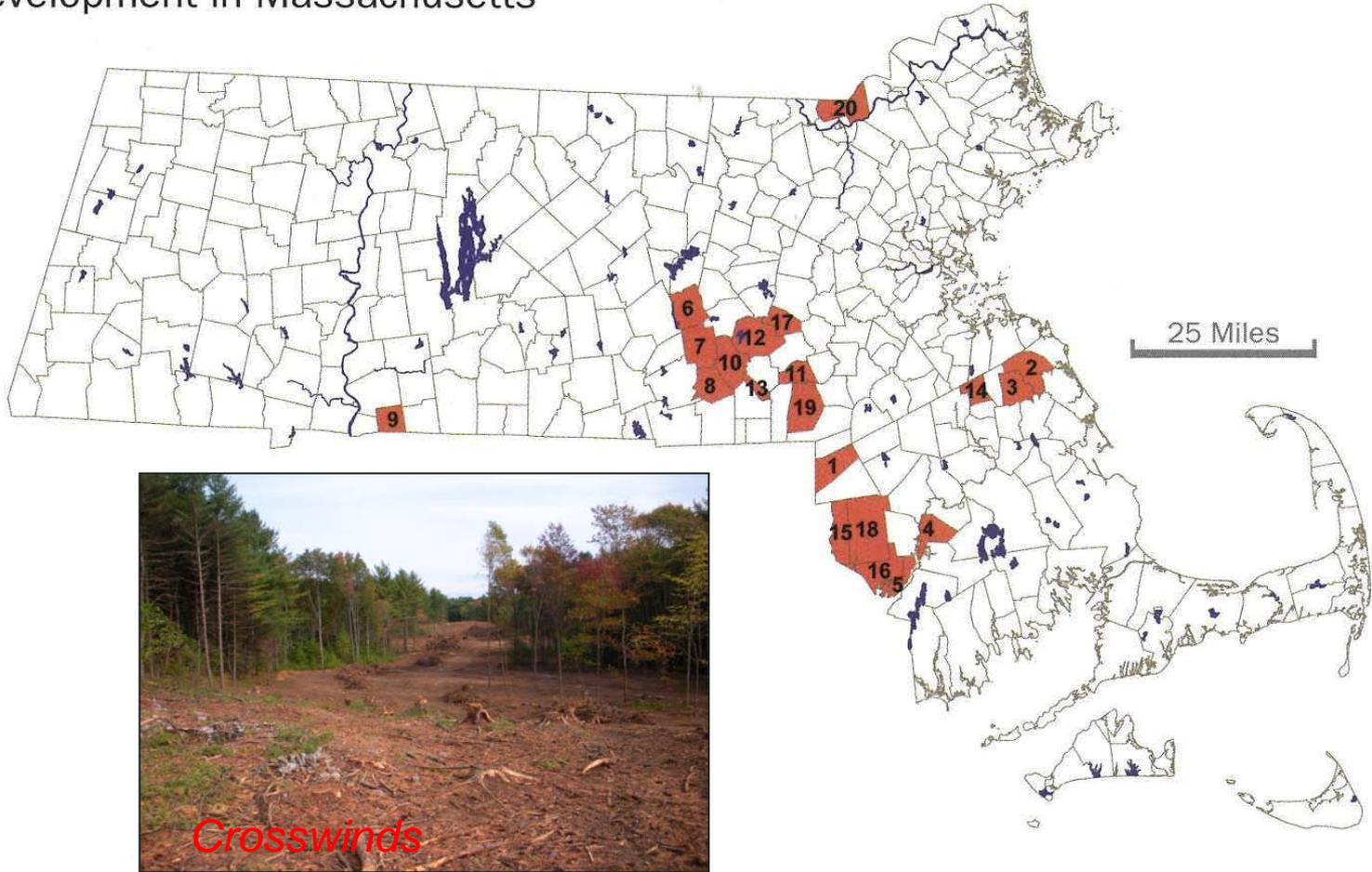
Save resources that would otherwise be threatened

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Sweetwilliam Farm is at serious risk of being developed as a subdivision putting the following in jeopardy:

- Scenic vista
- One of Upton's few remaining farms
- The opportunity to connect Warren Brook to Upton State Forest and build a town-wide trail network
- Historic North Street corridor

Figure 1.3: Hot spots of development: 20 Towns with the highest rate of development in Massachusetts



## Preserve or utilize currently owned town assets

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- Connects Warren Brook to Upton State Forest
- Provides parking for users
- Provides access to currently inaccessible of Town-owned property



**Demonstrate practicality and feasibility, and demonstrate that they can be implemented expeditiously and within budget**

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- Fairly straight-forward process to acquire land in fee-simple and to acquire a conservation restriction
- Have the help of the Sudbury Valley Land Trust – extensive experience in process of open space preservation
- Town has executed two other purchases using LAND grant (Self Help) grants
- Experienced Land Stewardship available to manage town owned property

# Upton Land Stewardship Committee



## Description

- Established in 2007
- Manages Town Conservation Land, the former Stefans Farm and Goss Pond
- Funded by a small annual budget, grants, and donations
- Assisted by volunteers

## Accomplishments

New trails at Howarth Glen and Warren Brook Watershed conservation areas  
Boardwalks at Peppercorn, Warren Brook and Howarth Glen - five Eagle Scout projects  
Stefans Farm Land Stewardship Plan  
Established Upton Community Garden, trails and parking area at Stefans Farm  
Maintained fields at Stefans Farm- mowed in 2007 and 2010  
Maintained existing trails and created trail maps



## Product an advantageous cost/benefit value

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- The CR property will continue to pay taxes
- No increase in cost of services that could result if the property were developed

## Leverage additional public and/or private funds

Uses State LAND grant, CPA State match, and other grants and donations to leverage taxpayer funds

Source	Amount	%
Upton - CPA Surcharge	\$ 371,183	28%
State - CPA Match	\$ 343,317	26%
State - LAND Grant	\$ 500,000	38%
Other Grants/Donations	\$ 95,000	7%
<b>Total</b>	<b>\$ 1,309,500</b>	

## Other CPA Committee Review Criteria

Criteria	OK?	Comment
Receive endorsement by other municipal boards or departments		Endorsed by Historical Commission
Serve more than one CPA purpose		Open space, passive recreation, and historic preservation
Respond to documented needs		Master and Open Space Plans
Serve the whole community or a significant part of the population		Those who enjoy using trails, everyone who travels down North Street, CSA members

# Questions?

