

Sweetwilliam Farm

Prepared by the Upton Open Space Committee

November 8, 2010

Sweetwilliam Farm: The 92 acre farm located on North Street includes pasture, agriculture fields, a working Community Supported Agriculture (CSA) Farm and woodlands. Looking to the west from North Street, the property includes one of the most spectacular views in Upton.

History: The 250 year old farm was owned by Eli Whitney's grandfather. The farmhouse was built by Eli's cousin Ephraim Whitney, a revolutionary war veteran. The Whitney Family owned the farm until about 1900.



Resources: The farm includes 18 acres of hayfield and pasture. Soils in the hayfields are classified as "prime farmland". In 2010, the CSA farm provided locally grown, organic produce to more than 100 families and the fields produced more than 1,200 bales of hay. Approximately 80 percent of the property is forested. The headwaters of Warren Brook, a cold-water stream, flow through the property. The farm is mapped as Biomap habitat by The Nature Conservancy and provides habitat for a state listed rare species. There are many stone walls and a tree lined cart path. The farmhouse is one of three 200+ year old homes located in close proximity to each other on North Street. The three homes were all once owned by the Whitney family.

Preservation Plan: The town would purchase the forested western and eastern ends of the property which together total about 60 acres. This land would be known as the Whitney Conservation Area. The remainder of the property including the pasture and hayfields would remain in private ownership. Approximately 27 acres would be protected from development by a Conservation Restriction (CR). The Sweetwilliam Farm CR will prohibit development of the pasture and any other activities which would negatively impact the view from North Street. The CR would exclude a two (2) acre envelope around the historic farmhouse and the store and a three (3) acre area located east of North Street and between North Street and the hay fields where a new single family home could be constructed. The CR would also permit the continued use of a small cabin on the east side and the modest expansion of the barn and green-house for agricultural use so long as the view from North Street was protected.

A 1650 ft. long trail easement through the Sweetwilliam Farm would link the eastern and western parcels purchased by the town. The public would have year round access to the trails and access to the hayfields during the winter. Town owned land would be open to hunting. Trails would be developed to connect the property to Upton State Forest and the Howarth and Warren Brook Conservation Areas, a nearly 1 mile long east-west trail corridor.

The project would include a permanent easement to provide for public parking off North Street at the Sweetwilliam Farm Country Store (the 80 x 30 ft. area would contain at least 5 spaces). A permanent easement would also provide the town vehicular access to the forested parcels.

The CR on Sweetwilliam Farm would be monitored by the Upton Conservation Commission and the Sudbury Valley Trustees. The Whitney Conservation Area will be managed by the Upton Land Stewardship Committee.

Benefits: The preservation plan will protect one of Upton's oldest farms, a spectacular scenic historic landscape, and 18 acres of farmland and pasture. Trails will provide a nearly 1 mile long east-west connection between Upton State Forest and the Warren Brook Watershed Conservation Area. The trails would be used by horseback riders, hikers, cyclists, skiers, birders and others who enjoy the outdoors. Sixty acres of wooded open space acquired by the town will be open to the public for passive recreation, including hunting. The Sweetwilliam Farm hayfields would be open to the public for passive recreation (skiing, snowshoeing) during the winter.

Cost: The cost of 60 acres to be purchased by the town, the Conservation Restriction, and the parking and trail easements is \$1,275,000. The cost is based on the average of two 2010 appraisals conducted for the town plus the cost of the parking easement. A third appraisal conducted for a bank in 2010 supports the valuation. Other anticipated costs total about \$35,000 (see below).

	Estimated Cost - Funded by CPA	Estimated Cost - Funded by Others	Notes
Costs			
Land/CR Acquisition	\$1,275,000.00	\$ -	Based on two appraisals
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 (ULSC)
Signage	\$ -	\$ 1,000.00	Materials only - labor provided by ULSC
Trails and Fencing	\$ -	\$ 5,000.00	Materials only - labor provided by ULSC
CR Endowment	\$ -	\$ 10,000.00	Funded by grant to SVT
Stewardship Endowment	\$ -	\$ 5,000.00	Trust fund held by Conservation Commission
Total Cost	\$1,288,500.00	\$ 21,000.00	
Reimbursements to CPA Fund			
LAND Grant	\$ 500,000.00		
Other Grants/Donations	\$ 74,000.00		
Total Reimbursements	\$ 574,000.00		
Net Cost to CPA Fund	\$ 714,500.00		

Funding: The project would be funded by a \$500,000 LAND grant from the state, no more than \$714,500 from the Upton Community Preservation Act funds (\$236,730 of which can only be used for open space), and at least \$95,000 in other grants and donations. The Upton CPA fund has a balance of more than \$2.6 million dollars in already collected funds and receives about \$400,000 in addition funds each year. The CPA committee voted to send the proposal to town meeting without objection. There would be no increase in Upton taxes or need for a Proposition 2 1/2 override vote.

Questions and Answers

What is a Conservation Restriction? A conservation restriction ("CR") is a legal document by which a landowner conveys a partial interest in land to a qualified conservation organization or public agency. By granting a conservation restriction, a landowner agrees to forgo or limit future development and restrict use of the property in order to preserve identified conservation values.

What will happen if the farm is sold? The conservation restriction will remain in place in perpetuity. All future owners will be bound by the same restrictions.

Have other towns purchased conservation restrictions to preserve private land? Yes. Some recent examples: Southborough purchased a CR to preserve the Chestnut Hill Farm in 2006. Framingham purchased a CR to preserve the Nobscott Hill Boy Scout Reservation in 2008. A CR was used to preserve a portion of the Pell Farm in Grafton in 2009. Sutton purchased a restriction to preserve the Whittier Farm in 2009.

Will the privately owned property continue to pay real estate taxes? Yes.

Why is it necessary to vote to fund the entire project cost from CPA funds? The state LAND grant program requires that the town purchase the land and the conservation restriction prior to reimbursement. Similar grants were used to successfully purchase Peppercorn Hill and the Warren Brook Watershed Conservation Area.

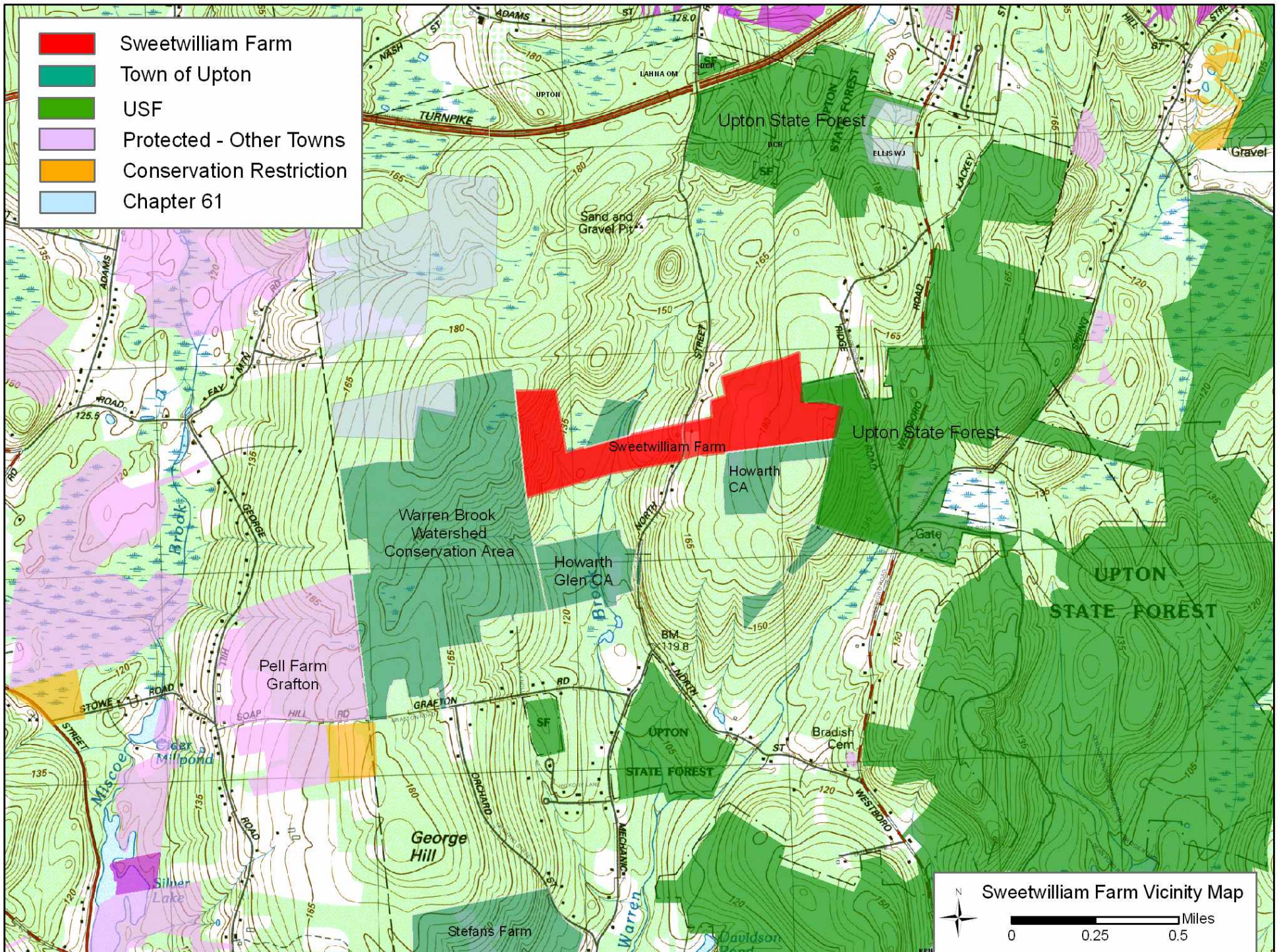
How are conservation restrictions valued? The value of a conservation restriction is determined on a case by case basis by a licensed appraiser. The rule of thumb is that a conservation restriction is worth 70 - 80% percent of the value of the land.

How many houses could be built on the Sweetwilliam Farm property? Both appraisals assumed about 20 houses could be built on the property. A plan prepared by Allen Engineering suggests that up to 30 homes could be built on the property.

If the town does not approve the plan, what is likely to happen? The owner will likely sell the farm to a developer and either a conventional or open space subdivision will be constructed. There are two high value frontage lots on the west side of North Street that are very vulnerable to development. Construction of homes on these lots would destroy the historic view.

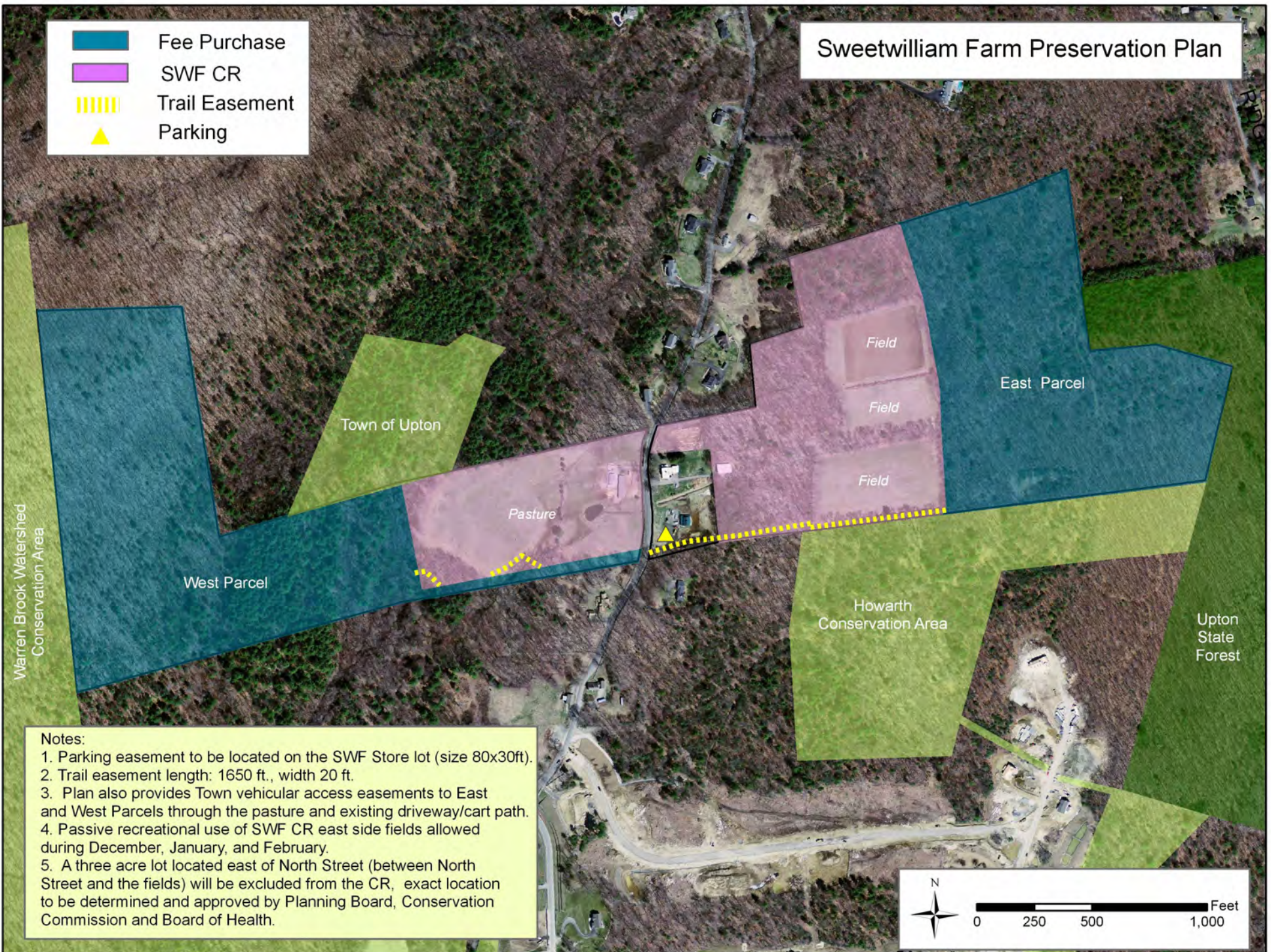
How will the conservation restriction be monitored and enforced? The Upton Conservation Commission and a non-profit land trust such as the Sudbury Valley Trustees will inspect the property each year to make sure the owners are adhering to the conservation restriction. The Sudbury Valley Trustees hold numerous CR's on private property and have professional staff dedicated to monitoring the CR's they hold. The Sudbury Valley Trustees has an endowment to fund monitoring and to legally defend the restrictions should problems ever arise.

Where will other funding come from? Private donations, and grants from nonprofit foundations. There will be no increase in Upton property taxes.



Sweetwilliam Farm Preservation Plan

-  Fee Purchase
-  SWF CR
-  Trail Easement
-  Parking



Notes:

1. Parking easement to be located on the SWF Store lot (size 80x30ft).
2. Trail easement length: 1650 ft., width 20 ft.
3. Plan also provides Town vehicular access easements to East and West Parcels through the pasture and existing driveway/cart path.
4. Passive recreational use of SWF CR east side fields allowed during December, January, and February.
5. A three acre lot located east of North Street (between North Street and the fields) will be excluded from the CR, exact location to be determined and approved by Planning Board, Conservation Commission and Board of Health.

