The Brooks Estate Master Plan
Summary - 2016

The Brooks Estate Master Plan was created in 2011/2012, discussed for two years with the Medford City Council and then rejected by the Medford City Council in April, 2014.

The Master Plan is now about 5 years old, and, like any plan involving costs and income, the numbers will require updating. We have therefore removed the original (340-page) version from this Web site.

The Plan’s basic elements, principles, and overall logic, however, remain solid.

So we have updated this 5-page Summary for those who may not be familiar with the Brooks Estate Master Plan in the first place.

January, 2016
The Brooks Estate Master Plan

- **The Vision**: a restored and self-sufficient Brooks Estate to benefit the people of Medford and future generations
- **Restoration Plan**: The Shepherd Brooks Manor, Carriage House and access drive will serve as a financial engine and realize the Estate’s full potential as a community asset
- **Business Plan**: function rental income repays the entire capital investment (and interest) in 20 years or sooner

**Master Plan Overview**

The Brooks Estate Master Plan is a comprehensive document that details the long-term vision for the Brooks Estate, including the further restoration of the Shepherd Brooks Manor, Carriage House and the natural and historic landscape.

**Key Goals of the Master Plan**

The central goal of the Plan is to complete the basic restoration of the property to:
- maximize its community potential
- ensure that it is financially self-sufficient
- maintain its natural and historic values
- provide funds for other improvements

**The Heart of the Master Plan: Why It Works**

The Plan shows how the re-use of the historic buildings as function facilities and new community space will pay off the capital investment for restoration. [This is called “amortization.”] In this case, however, the owner of the property, the City of Medford, has been asked to provide the bulk of the capital funding, which will be repaid.

This is a very common financial model for the re-use of historic buildings for public benefit, including those held by municipalities such as the City of Medford. Furthermore, the Brooks Estate is a public asset and merits public support.

**What are the parts of the Plan?**

- **The Vision** – restoration and preservation principles and overall goals of the Plan
- **Capital / Restoration Plan** – plans and cost estimates for buildings and infrastructure

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*Brooks Pond in late fall  (photo by P. Saunders)  
An inviting walking path...  
South Verandah in winter 2016*
A Beautiful and Useful Space
The brick walls, massive roof beams, dormers, sliding doors, and “cathedral-like” interior of the Carriage House will make a beautiful and useful room for meetings, functions, and a wide range of community activities for all ages. We have prepared CAD drawings and developed a basic plan for the restoration. Basic cost estimates have been supplied by professional estimators. We’re ready for detailed design!

What and Why
The restoration of the Carriage House as a multi-purpose function facility and community space is at the heart of the Master Plan. The restored Carriage House will be an excellent venue for a huge variety of social, business and community events. What better way to recycle this beautiful Victorian structure! And, this adaptive re-use will be the primary engine for the financial self-sufficiency of the property. Residents of Medford will enjoy reduced rental rates throughout. The public (and the natural world) will continue to enjoy the landscape and open space that is the essence of the wonderful Brooks Estate.

Function, Beauty and Flexibility.
The floor plan and footprint for the fully restored Carriage House combine its historic beauty with modern functionality. (See drawing below). The main space (in green) is about 45 feet sq. Functional space for operations are at the back (red), with storage to the left (yellow). Front and side patios (orange and blue) add outdoor space and a vital connection to the Manor/Yard.

The Vision: a Fully Restored Brooks Estate

- Shepherd Brooks Manor and Carriage House
  - restored as function facility and community space
- Historic Core landscape
  - parking, circulation, and facility access, including forecourt and patio
- Access Drive and related infrastructure
  - rebuilt drive, new utilities, lighting, etc.
- Open space and habitat
  - Brooks Pond protection and access; ecological management of rest of property

The Medford City Council voted down the Brook Estate Master Plan in April, 2014… [after supporting funding for every other community asset on the capital planning list].

The Brooks Estate has been owned by the City of Medford since 1942. The property has never had a maintenance budget or a capital budget. As a consequence, not only have we had to overcome decades of neglect, but the restoration effort has been done in mostly small bites, hardly the most efficient approach. As seriously, with construction inflation, every year costs go up.
Plans for the Shepherd Brooks Manor

The Shepherd Brooks Manor (1880) is a true Victorian gem that anchors the historic heart of the property; it will also help the Brooks Estate attain self-sufficiency and its full potential as a community asset. The main goal here is to have a mix of spaces for meetings, functions, and community uses. The Manor Yard offers a perfect setting for a variety of events such as weddings.

Substantial progress has been made on the overall restoration of the Shepherd Brooks Manor, but these steps need to be completed:

- Restore 5 historic rooms to full glory
- Finish systems upgrades and exterior trim
- Install management and archival space (2nd floor)
- Add a caretaker apartment on the third floor

The historic Parlor, Main Hall, Library and Dining Room are perfect for smaller meetings and intimate gatherings. In addition, the West Porch (at the back) and the restored South verandah enhance outdoor events and use of the Manor Yard.

Access Drive

The access drive from Grove Street will be re-done as a modern drive with an historic look, including the removal of invasives and replacement with natural vegetation along the woods.

This part of the project also includes: landscape/diversity improvements; conduited utilities; and lighting for a sustainable, inviting and functional gateway to the historic buildings.

Open Space and Habitat

The open space and natural areas throughout the Brooks Estate will also benefit from a long-term plan to remove invasives, improve the forest understory and vistas, and recreate a natural meadow on the north side of the property.

The goal is to enhance the natural habitat and the environmental values of this invaluable open space.
The Brooks Estate of Medford, Massachusetts

A Brief History of the Brooks Estate

In 1660 Thomas Brooks purchased 400 acres of land in Medford. The family was prominent in local and Colonial affairs. In early 1800s Peter Chardon Brooks became Massachusetts’ first millionaire. His grandsons, Peter Chardon Brooks III and Shepherd Brooks built two summer homes on the property: Point of Rocks (1859) and Acorn Hill /Shepherd Brooks Manor (1880); the families visited in the summer for many years.

In 1942 the remaining 82.5 acres were purchased by the City of Medford. From 1946-54, Brooks Village was created as housing for 200 WWII veterans’ families, including nine families in the Manor, which was then used as a nursing home and group home through the late 1980s. During this period, the Estate and historic buildings suffered considerable neglect. In 1990s, the property was rescued by a grassroots citizens advocacy effort in Medford, led by the Brooks Estate Preservation Association (BEPA), who cleared tons of debris, restored trails and recovered the 300-year history of the property. Citizen efforts culminated in a permanent Conservation and Preservation Restriction on the Brooks Estate in 1998. The Medford-Brooks Estate Land Trust (M-BELT) now leads efforts to protect and restore this wonderful treasure.

Space for People and Nature

50 acres of conservation land: woods, Brooks Pond, wetlands, trails, glacial features, birds, small mammals, walking trails, flowers, vistas, Brooks Pond and that most precious of resources—peace and quiet. The grounds are open dawn to dusk for walking, birding, fishing (catch and release), and the enjoyment of this quiet landscape and its long history.

Our Track Record: Protecting and Restoring the Brooks Estate

The Medford-Brooks Estate Land Trust (M-BELT) has worked hard to accomplish these goals:

- Protection, education, outreach, and advocacy
- Cleanups and spruce-ups
- Programs for adults and kids
- Planning and physical restoration

We have worked with Medford residents, the City of Medford, the Mayor, the Medford City Council, OCD, experts, the schools, and community groups.

With your support we have done all this:

- Held over 44 Open Houses, 30 bird walks and multiple workdays and spruce-up events
- Removed well over 100 tons of trash from the Brooks Estate, mapped wetlands, improved trails, and certified a vernal pool
- Managed thousand of hours of volunteer efforts to improve the grounds and historic buildings.
- Raised and spent over $450,000 in private funds on the Manor and Carriage House, landscape work, maintenance, planning studies, etc.
- Help manage over $1 million in restoration projects at the Shepherd Brooks Manor, including: a restored slate and copper roof, five chimneys, 70 windows and shutters, new bathrooms, new West Porch and Verandah, and numerous infrastructure improvements.
- Engaged experts in Adaptive Re-use (Historic Function Facilities), Historic Landscape Architecture, and Historic Restoration Architecture to help develop the Brooks Estate Master Plan.