

III. History of the Brooks Estate

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Introduction

The Brooks Estate has been a part of Medford's landscape for 350 years. An entire book (or two) could be devoted to telling the rich and detailed history of the Brooks Estate, the Brooks family and the integral role the property and people have played in Medford's long history. Accordingly, what follows in this section are brief descriptions and highlights of the major historic periods of the Estate. The Brooks family land holdings over the past three and a half centuries included dozens of different properties in Medford and Winchester, a half-dozen major houses (many still surviving) and numerous open spaces donated to Medford by the Brooks family. It is fair to say that no family in Medford's history has had such an effect on Medford's physical development as did the Brooks family. The information in this section is drawn from a wide variety of sources, including the M-BELT archives, the Medford Historical Society, the Massachusetts Historical Society, an academic paper by Linda Penta (late wife of City Councilor and M-BELT Board member Robert Penta), and other sources.

Before 1660

The Mystic Indians, a subgroup of the Pawtucket Indian tribe, lived in Medford and the surrounding area for thousands of years before the Pilgrim and Puritan settlement of Massachusetts in the early 17th century. They hunted and fished along the shores of the Mystic River and moved seasonally with the food sources. Due to conflicts with warring Penobscot tribes, two wooden forts were constructed in Medford, one at the eventual site of Point of Rocks on the Brooks Estate. After their defeat by the Penobscots, the Mystic Indians went into a long period of decline, accelerated by the smallpox epidemic of 1633, that wiped out entire regions of New England Native Americans just as the Puritan great migration to New England was gaining ground. In Medford, evidence of the Mystic Indians' presence can be found in the Sagamore John monument on Sagamore Avenue in West Medford, where the remains of Sagamore John (real name Wonohaquaham) and four other Native Americans were reinterred after their accidental disturbance by a member of the Brooks Family in the 19th century. Indian artifacts such as arrowheads were still being discovered by the Brooks family on their estate well into the 20th century.

Brooks Family Early History (1660-1800)

In 1660, the original 400 acres of the Brooks Estate were acquired by Thomas Brooks, one of the first Puritan settlers of Boston. The original Brooks family were farmers and developed their lands over eight generations, eventually becoming one of the wealthiest and most prominent families in Medford and all of Massachusetts. The property was a working farm for over 250 years and, once the family achieved wealth and status, it served as the family's "summer place" in the late 19th and early 20th centuries.

The Brooks family land holdings enlarged and shrank several times over the course of the family history, reflecting the changing fortunes of the family. At its apex, the Brooks land holdings

encompassed most of present-day West Medford, from the Winchester Line in the north to the Mystic River in the south and the Mystic Lakes to the west. The “spine” of the various Brooks Estates over the years was always Grove Street, which ran through their property accessing the various houses, fields and support buildings.

As one of the original families of Medford, the Brooks family was involved in the earliest formation of Medford's government. The Brooks family had many prominent members in the first two centuries of their habitation in Medford, including Edward Brooks, who fought the British at Concord in 1775. Legend has it that Edward's wife Abigail Brooks served cocoa to the Minutemen as they passed through the Estate on the way back to Boston after the battle.

Other notable Brooks include John Brooks (1752-1825), who served as Governor of Massachusetts for seven years from 1816-23, after a distinguished career as a military officer in the Revolutionary War, and Philip Brooks, the distinguished pastor of Trinity Church, whose statue graces the building.

When it comes to the Brooks family history, slavery is an important issue that must not be overlooked. Slavery started very early in Massachusetts' history, within a few decades after the arrival of the Pilgrims and Puritans in the 1620s and 1630s. The Brooks were slave owners as early as the 1720s and held several enslaved Africans until 1783, when they were freed after Massachusetts abolished slavery. While the Brooks families were not industrial-scale slave-owners like their contemporaries across town at the Royall House at Ten Hills Farm, the Brooks family slaves played a significant role in the family's wealth.

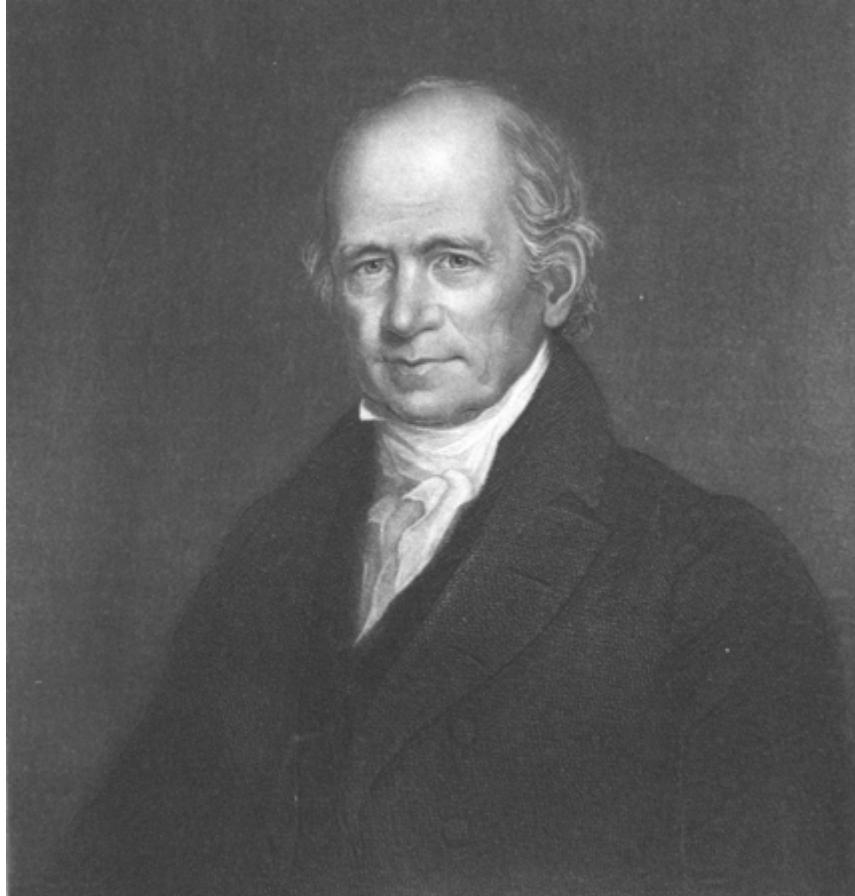
The physical evidence of the Brooks slavery is to be found off Grove Street, where the Slave Wall stands to this day, built in 1765 by a Brooks family slave named Pomp. While on balance, the Brooks family history is filled with many dozens of examples of their generosity and contributions to the City of Medford, their role in the institution of slavery is definitely the low point of their history.

Rise of the Brooks Family (1800-1859)

From the very beginning, the Brooks family had been one of the more wealthy and active families in Medford. However, the power and influence of the Brooks family was taken to a whole different level in the first half of the 19th century when Peter Chardon Brooks I (1767-1849) amassed a fortune through hard work, astute business decisions and personal connections. Peter was born into a relatively modest Brooks family, and when his father died, he was just a teenager. The loss of Edward Brooks most likely caused Peter to skip college to work as an apprentice for a merchant in Boston, walking the six miles to and from work every day.

Peter soon found his way to the field of marine insurance, where he thrived and succeeded his retiring employer at the perfect time, when war and instability in Europe raised rates and added to a dramatic increase in American trade. Peter personally wrote every account and made it a rule never to borrow money, never engage in speculation of any kind and never take more than the legal rate of interest. Peter's work ethic and his position in the right profession at just the right time

brought him incredible wealth and opportunity. Aided by smart investments in the First Bank of the United States, Peter Chardon Brooks retired at age 36 in 1803. When he died in 1849, he was the wealthiest man in Massachusetts, worth several million dollars.



Peter Chardon Brooks I

Peter's wealth was the catalyst for the Brooks family for the next two centuries as he had the money and will to expand his family farm as he desired and build large homes and gardens commensurate with his elevated status. In the process, an important change occurred in the Brooks Estate: the farm was transformed from an agricultural business into a functioning farm that also served as a summer retreat and pleasure ground for the family. The Brooks family now traveled in the very elite circles of Boston society, marrying into families like Gorham, Lawrence, Gardner, Everett, Adams, Saltonstall and others.

Peter's sons Edward and Gorham Brooks succeeded Peter and continued the development of the Estate, enlarging it and adding new residences over time. Gorham had two sons, Peter Chardon Brooks III and Shepherd Brooks, both of whom were born into wealth, were educated and well-traveled and never had to work to support themselves. Peter was twenty-four years old and Shepherd was eighteen when their father passed away in 1855. It was Peter and Shepherd's ambitious plans for an undeveloped part of their estates at Point of Rocks and Acorn Hill that would ultimately bestow upon Medford the Brooks Estate in its present-day form.

The Victorian Brooks Estates (1859-1920)

In the latter half of the 19th century, the Brooks family was at the height of their influence and standing, and this wealth was reflected in the construction of two of the greatest Victorian buildings in Medford's history: the Peter Chardon Brooks Manor at Point of Rocks, designed in 1859 by Calvert Vaux, and the Shepherd Brooks Manor on Acorn Hill, designed in 1880 by Peabody & Stearns. These two examples of high Victorian architecture for summer homes on large gentleman's estates represented the highest levels of integrated architecture and landscape design ever built in Medford.



Point of Rocks, designed by Calvert Vaux in 1859. 1885 photo by Sarah Lawrence Brooks.

Point of Rocks was situated on the highest point of the Estate and had commanding views over the mostly open fields that surrounded it. Designed in the popular Italianate style, the massive building was accessed from Grove Street via a drive framed by a pair of stone pillars (since moved to frame the Access Drive to the Shepherd Brooks Manor) leading to a winding road that revealed the various vistas across the Estate. The building itself was a sprawling granite mansion with a prominent entry tower and porte-cochere and a wrap-around piazza (stone porch) overlooking the commanding views to the south and views to the west overlooking the Brooks' land that extended to the shores of the Mystic Lakes. The building, which the family referred to as the "stone house", also had a large stable with horses and several outbuildings supporting the working farm. Few drawings of the interior are available, but several historic photographs and written descriptions make clear that the interior of Point of Rocks was as elegant and rich as the exterior.



Peter Chardon Brooks III on the piazza of Point of Rocks. 1884 photo by Sarah Lawrence Brooks.

The landscape for the Point of Rocks section of the Estate was typical of the period: open fields, iron fencing, wood arbors framing views, stone urns and other elements graced the grounds around the buildings.



The rolling open fields typical of the Peter Chardon Brooks III Estate.
1884 photo by Sarah Lawrence Brooks.



1881 photograph of Shepherd Brooks Manor, designed by Peabody & Stearns.
Photo from the Massachusetts Historical Society collection.

The younger Shepherd Brooks built his own summer home at Acorn Hill in 1880. Designed by noted 19th century architects Peabody & Stearns, the Manor is a much different building from Point of Rocks in scale, architecture and landscape. Like his brother's house, the Shepherd Brooks Manor has a dramatic entry approach that creates views of the building and landscape, but the approach to the architecture and landscape reflects a different aesthetic - a more naturalistic design that invisibly "improved" the landscape through informality, a lack of ornamentation and a blending of the architecture and landscape. The Manor, though still an impressive and large building, was designed in an intricate Queen Anne style that made it feel more residential and cozy. While the interiors of Point of Rocks expounded their wealth with carved stone mantels and staircases, the interior of the Shepherd Brooks Manor is a more subtle approach, a mix of natural woods - one for each room - including ash, pine, cherry and butternut.



1881 view of Shepherd Brooks Manor Library.
Photo from the Massachusetts Historical Society collection.



Shepherd Brooks on the steps of the west porch with wife Clara, and, left to right, their three children:
Gorham, Rachel & Helen. Photo from the Massachusetts Historical Society collection.

Both buildings were used by the respective Brooks families for the next four decades as their summer homes and farms, a refuge from the bustle and noise of Boston where they lived in winter. These gentleman's farms were working farms that produced enough food to be self-sufficient, but they were primarily used as retreats where the Brooks families lived and played.

After Shepherd Brooks built his summer home at Acorn Hill in 1880, he proceeded to transform the surrounding landscape to match the environment around the Manor. Brooks Pond was created out of a natural marsh at the low point of the Estate in the summers of 1884-1889, hand dug by Irish immigrants to create a 10-acre water feature that both Manors overlooked.



1886 photo of Brooks Pond under construction on the left, and completed in 1890, on the right.
Photos from the M-BELT archives



View of Brooks Pond from Shepherd Brooks Manor.
1890 photo by Sarah Lawrence Brooks.

As the Brooks' family wealth and influence grew, so did their contributions to Medford and the arts. The Brooks family dominated West Medford and used their position to enhance the cultural life of their home town. Local landmarks directly supported by the Brooks family from this period include: the Grace Episcopal Church in 1869, which was entirely paid for by the Brooks family; the entire shoreline of the Upper and Lower Mystic Lakes, which the family donated to the Commonwealth; a donated portion of their land to the Middlesex Fells; Playstead Park (originally known as Brooks Playstead), the Thomas Brooks Park (along Grove Street containing the Slave Wall); the Brooks School, among many others. The current Brooks School on High Street is the fourth school built with the Brooks name attached to it.

The Brooks family were generous patrons of the arts as well, collectors of works by Monet and many other European artists. The Brooks also commissioned several family portraits by John Singer Sargent including a life-sized portrait of Sarah Lawrence Brooks that graces the American Gallery of the Peabody Essex Museum. The Brooks family were also major contributors to the then-new Museum of Fine Arts in Boston, and donated at least a dozen paintings and several sculptures. The Native American statue "Appeal to the Great Spirit" was purchased and donated by the Brooks family for the entry courtyard of the Museum of Fine Arts, where it still stands today.

One final Brooks family legacy during this period is their connection to Chicago. After the Chicago fire of 1871 destroyed four square miles of the city, Peter and Shepherd Brooks saw an investment opportunity, convinced that Chicago would rebound and emerge as a regional center of trade and manufacturing. Over several decades, the Brooks brothers became developers in the reborn Chicago, financing the construction of numerous landmark buildings, including the Rookery (1888), the Monadnock Block (1891), the Marquette Building (1893), and the Brooks Building (1910), among others. These buildings still stand in present day Chicago.

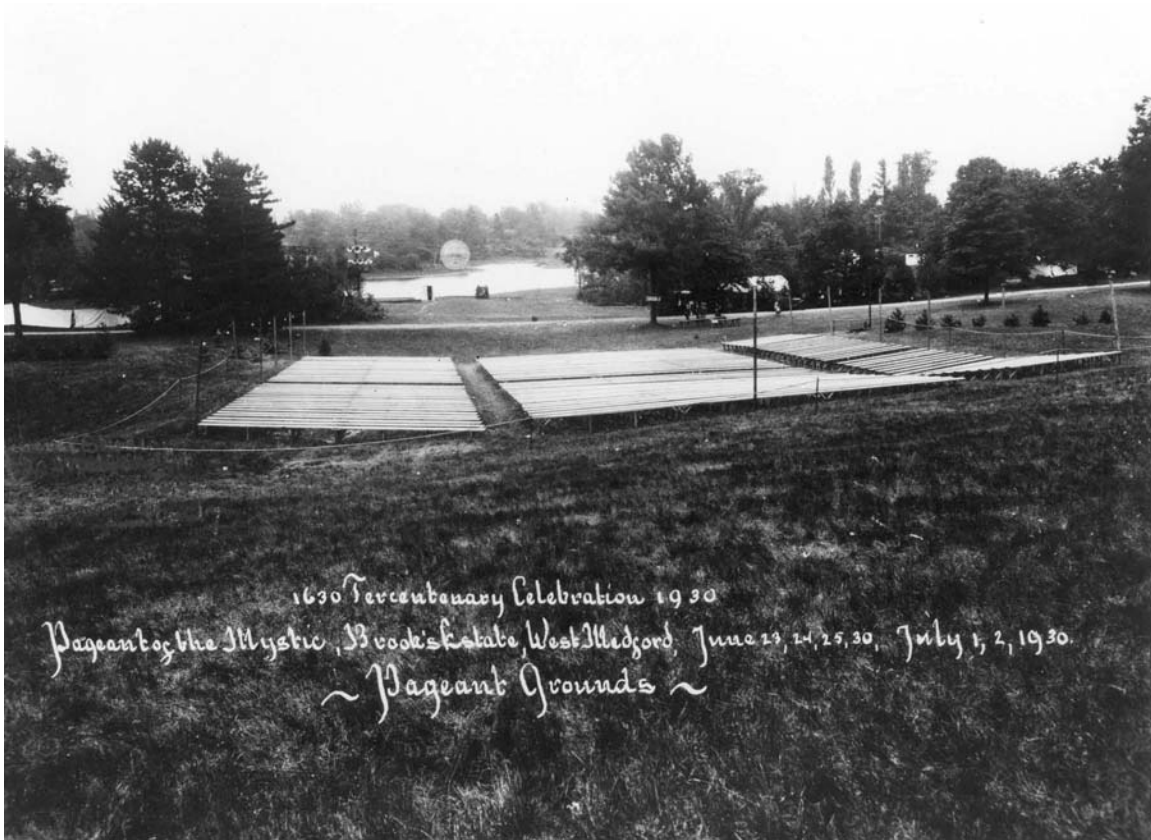
The Last Brooks Generation in Medford (1920-1942)

With the passing of Peter Chardon Brooks in 1920 and Shepherd in 1922, the Brooks Estate went into a long period of transition. Medford itself was in a major period of transition as well, as a once quiet rural town was transformed in only a few decades into a dense suburban city. Clara Gardner Brooks continued to live in the Manor, and the Brooks family started to donate the outer parts of their property ownings in Medford as park land and sold other parcels to real estate developers.

In 1926, Clara and her son Gorham arranged for the transfer of the Estate to the Federation of Bird Clubs of New England upon her passing, to be called the "Shepherd Brooks Wildlife Reservation". However, this wonderful plan never came to pass, as the Federation did not have the funds to maintain the Estate. Clara's will allowed for this possibility by transferring the Estate to the Metropolitan District Commission (MDC), now the Department of Conservation and Recreation (DCR). However, the MDC could not undertake the financial responsibility either, so the property reverted to Shepherd and Clara's three children and a family trust.

During this transition period, Clara Gardner Brooks started to open up the Estate for public use in the hopes of planting the seeds for its eventual use by all of Medford and beyond. Clara allowed the construction of a Girl Scout cabin in a heavily wooded section of the Estate, where for many

years Girl Scouts learned about nature and the birds of the Estate. The foundation of this cabin still exists in the center of the Brooks Estate today.



1930 photo of the Medford Tercentenary Celebration held at the Brooks Estate. Brooks Pond and the giant medallion of the Seal of Medford are in the distance.

Even more ambitious was the 1930 Pageant on the Mystic, celebrating the 300th anniversary of Medford. Clara offered to host this massive production at the Estate, a multi-day extravaganza telling the story of Medford's history with a cast of over 1,000 persons taking part and tens of thousands more watching on the shores of Brooks Pond, which served as a backdrop for the Pageant. It was a brief taste of the community asset that the Brooks Estate could be to Medford.

Clara's death in 1939 passed control of the Estate to her children, who then sold the 82.5 acres to the City of Medford in December, 1942 for \$55,000, one third of its assessed value. It was originally proposed that the City of Medford acquire a portion of the Estate for Cemetery use and a portion for the Park Department. However, this dual-use would have required two bond issues for the \$55,000 cost. In the end, Medford decided to issue a single bond "for cemetery purposes" as the Park Department had no means by which to repay the bond, while the sale of graves would provide the means to repay the bond. With the sale of the Estate complete and the selling off of the remainder of Brooks family properties in Medford and Winchester, the presence of the Brooks family ended in Medford after nearly three centuries.

World War II and Aftermath (1942-1946)

With World War II consuming and transforming society, the Estate was a low priority for Medford during the years 1942-1946, and any planning or maintenance for it quickly fell to the side while the war raged on. A caretaker was installed in the Manor and the Tree Warden moved into the nearby Hamlet, but Point of Rocks was unaccounted for. By this time, Point of Rocks had been abandoned for many years and was being vandalized on a regular basis for its architectural parts. A plan was drawn up in 1945 that called for the destruction of both the Point of Rocks and Shepherd Brooks Manor, in addition to the near-complete development of the Estate as cemetery land. However, the housing crisis that emerged right after World War II saved the Estate and Manor, which could easily be adapted for returning World War II veterans and their families. But Point of Rocks was in much worse shape and for reasons that are difficult to fathom in retrospect, it was destroyed by the City of Medford in July, 1946.

Brooks Village (1946-1954)

Using federal funds, The City of Medford made a major intervention at the Brooks Estate with the construction of 200 units of "temporary" housing for returning World War II veterans and their families, called Brooks Village, in 1946. Several dozen one-story houses were built in the portion of the Brooks Estate between Brooks Pond and Grove Street. There were two Brooks Village sites, A and B. Site A was located around several curved roads north of the Access Drive (responding to the sloped grades of this area) while Site B was built in a grid on the flat section of the Estate located between Brooks Pond and Grove Street – the site of the most recent expansion of the Oak Grove Cemetery. The temporary houses were one-story, two room gabled mini-houses, back-to-back with a common wall in-between. The third component of Brooks Village was at the Shepherd Brooks Manor, which housed ten families after it was converted to an apartment building (see Manor Section for more details). In all, several hundred families had their first homes at Brooks Village over the next nine years.



Photo of Brooks Village taken from Grove Street. M-BELT archives.



1954 Aerial view of the Estate from M-BELT archives showing Brooks Village locations on the Brooks Estate. Site A north of the Access Drive and Site B is south of the Access Drive. The Shepherd Brooks Manor and Carriage House are clearly visible in the upper right corner of the photo.

By all accounts, Brooks Village was a wonderful place to grow up for new families just starting after World War II. Many Brooks Village residents continued to live in Medford for years after Brooks Village was removed. BEPA sponsored and organized a reunion in 1996 for the families of Brooks Village where many of the children who had lived there, now older adults and some even senior citizens, recounted their fond memories of playing at the Estate, skating on Brooks Pond and generally growing up in a unique environment with forests, rolling hills, a Victorian mansion and a large pond literally at their doorsteps. The overwhelming feeling of gratitude by the young parents starting their lives after living through the Depression and World War II was deeply felt by their children at the Brooks Village Reunion.



1996 Brooks Village Reunion, organized by the Brooks Estate Preservation Association.

During this time, the Estate's landscape started to change as the open fields gave way to a young forest that naturally developed once the landscaping of the Estate came to a halt. The mostly open fields of the Peter Chardon Brooks Estate slowly began to be filled in while the specimen trees and "naturalistic" landscape at the Shepherd Brooks Estate were left unattended and evolved into a different ecology as nature took its course.

Decay and Change (1954-1989)

The four-decade period from 1954-1989 represented a slow but steady decline in the Estate at every level. Brooks Village came to an end in 1954 and was dismantled. Site A north of the Access Drive was eventually transformed into the new-growth forest that grew up at the Estate during this period. Since the buildings had no basements and minimal foundations, physical evidence of Brooks Village is very limited. A few patches of pavement from Site A can still be seen in the Estate if one knows where to look.

Site B is much easier to imagine because the streets that were laid out for Brooks Village in this area remain to this day as the grid of roads in the section of Oak Grove Cemetery between Grove Street and Brooks Pond.

The Manor was converted to a City of Medford nursing home in 1956 and was used as such for the next twenty plus years, eventually being converted to a group home for physically-challenged adults in the 1980s (the Hegner Center) and then used by caretakers thereafter. The Manor was mostly ill-treated during this time period with minimal maintenance and outright neglect. It was only the fact that the Manor was built so well, so durably made from quality materials, that kept the building from completely falling apart. In fact, the Carriage House *did* start to fall apart.

In the 1970s, as the architectural preservation movement began to emerge in the United States, a few Medford pioneers started to focus their attention on the Estate and Manor. With the 200th anniversary of the Revolutionary War approaching, hundreds of historical buildings and sites nationwide were rediscovered by caring citizens and historical societies. In 1975, the City of Medford and Medford Historical Commission nominated the Brooks Estate to be placed on the National Register of Historic Places, which was accepted later the same year. This was an important milestone for the Estate, the first murmurs of the movement that would eventually lead to its permanent protection twenty-three years later in 1998.

The next two decades were even less kind to the Estate than the previous two. Receiving even less care and maintenance than the Manor, the Carriage House literally started to fall apart. Photographs from the 1980s show the back section of the Carriage House roof buckled and imploding. Only an emergency measure, the insertion of a solid wood bearing wall supporting the building, prevented its total collapse in 1988. The back third of the roof beyond the temporary wall was removed and remains open to the air to this day. Two of the three dormers on the building were lost completely.

The landscape also suffered from outright neglect. While the new forest was several decades into its life, the Estate was discovered by contractors who used it illegally as a dumping ground for all kinds of debris. Teens and other less respectful users of the Estate littered the woods with trash, beer cans and tons of junk, including car tires and batteries. The Estate was dying and was treated with contempt. While this portion of the Estate was technically controlled by the Oak Grove Cemetery, in fact it was largely unsupervised for many years.

Two Studies of the Estate (1989-1992)

In the late 1980s, the City of Medford finally started to grapple with what to do with the Brooks Estate as two separate planning studies were done of the property.

In 1989, the Oak Grove Cemetery Board of Trustees hired LEA Group, Inc., of Boston to study the further expansion of the Oak Grove Cemetery into the Brooks Estate. The study consisted of a soil report and a schematic treatment of proposed cemetery lawns totaling some 15 acres at the heart of the property. The report suggested that land not suitable for burial purposes be developed for passive recreation, with development of nature trails for walking, bird watching, as well as picnic areas. The recommendations for passive recreation covered the northern section of the site and around Brooks Pond. The northern site consists of an upland area of wooded steep slopes and bedrock outcroppings. As the study was contracted and paid for by the Cemetery Board, it viewed the Brooks Estate purely through the lens of how it could be maximized as a cemetery. Thus, the only land to be used for passive recreation would be that which was not usable for burial purposes. This study did not look objectively at the whole Estate and all possible uses for the benefit of Medford and was not approved by the City Council.

On February 15, 1991, the Brooks Estate was selected as one of four properties in Massachusetts for participation in the Architectural Conservation Trust (ACT) Feasibility Studies Program. The

project's goal was to identify, plan and complete a re-use study of the sixty-odd acres of undeveloped woodland of the Brooks Estate.

The results of this study focused on three options for the land use: 1) community conference and meeting center, 2) retirement housing and 3) congregate housing. Each of the choices would be centered on the Shepherd Brooks Manor, the Carriage House and the 2.2 acres of land around the buildings. The second and third options effectively would have reduced the woodlands to a great extent.

Interestingly, the study states that though little known and used, the Brooks Estate is one of Medford's greatest assets with a brilliant future if the principles of historic preservation and good urban planning are followed. The ACT report was placed on file in the City Hall Office of Community Development but ultimately was not acted upon by the City of Medford.

The Cell Phone Tower Proposal and BEPA (1992-1998)

The future of the Brooks Estate forever changed with the proposal in 1992 for a 100-120 feet tall cell phone tower to be erected next to the historic Shepherd Brooks Manor at one of the highest points on the Estate. The tower was proposed by the Cellular One Company, and its primary rationale was as an income generator for the City of Medford. This proposal set off a firestorm of protest by citizens who felt the historic Brooks Estate deserved a better fate. The Medford City Council rejected this proposal on May 8, 1992.

The cell phone tower controversy led directly to the creation of the Brooks Estate Preservation Association (BEPA) in September, 1992 - founded by Rob Ciampa, a local resident with a passion for history. The Brooks Estate Preservation Association was an independent non-profit organization led by citizens who cared about the Estate's various aspects - nature, history, open space, architecture - and this group began to lobby for the Estate's permanent protection. BEPA adopted by-laws and Articles of Organization and elected Officers and a Board of Directors on November 16, 1993 and was fully incorporated as a 510 (c) (3) nonprofit in 1994. Tom Lincoln soon assumed the leadership of BEPA, becoming its President and tirelessly led the charge to save the Estate, with over 500 members joining in the subsequent multi-year campaign.

In the course of the next four years, BEPA organized a half-dozen clean-ups at the Estate, removed some 65 tons of accumulated trash, offered bird and guided walks, created a trail map, published a newsletter and erected a sign, in addition to researching the history of the Estate. The ultimate goal was the permanent protection of the remaining Brooks Estate, so that the land and buildings would become assets for the community.

On February 18, 1993, Mayor McGlynn announced that a tentative agreement on the future use of the Estate had been reached between the Cemetery Board of Trustees and the Medford Historical Commission. Under this scheme, the cemetery would retain 15 acres as requested for burial purposes. The Medford Historical Society would enter into a lease with the City of Medford for control of the Manor, Carriage House and 2.2 acres of land immediately surrounding the buildings.

A feasibility study for the reuse of the property would be undertaken which would include alternative uses consistent with the goal of restoring and preserving the rest of the Estate.

Shortly afterwards, Child Associates, Inc. was awarded the contract to prepare a Land Use Master Plan Report for the Brooks Estate. The report cost approximately \$150,000 and took over 18 months to complete. As the Child Study dragged on, the Brooks Estate Preservation Association decided to undertake its own report. In March, 1994, BEPA announced the imminent arrival of its "Community Proposal for the Brooks Estate." The 32-page study was a succinct review of the Estate's history, current condition and future potential, and it called for the permanent preservation of the property with no additional cemetery space on the Estate.

One day before BEPA unveiled its study, Child Associates presented its preliminary conclusions at a press conference at Medford City Hall in April, 1994, which included all of the recommendations found in the final Report completed more than a year later in June, 1995.

The Child Report addressed the City of Medford's four directives written into its contract:

- Preservation of the historic estate, including the Shepherd Brooks Manor and Carriage House
- Creation of recreational open space around Brooks Pond
- Development of a golf course; and
- Development of a parcel of 15 acres for new cemetery interment to meet the growth requirements of the cemetery and to provide for long-term maintenance and management of the property.

In addition to answering these four directives, the Child Report made the following recommendations:

- A permanent conservation and preservation restriction be put on the Brooks Estate and the buildings restored
- The entire surrounding wetlands of Brooks Pond be preserved in its natural state
- A golf course was not feasible
- 6.5 acres at the Grove Street side of the property be reserved for future cemetery expansion

Child Associates was also asked to evaluate the feasibility of re-use of the Manor and Carriage House as a Civil War museum and function facility. The report contained detailed information on the topography, vegetation, history, present uses and conditions of the Brooks Estate and a full survey. A critical point in the Report was that although it studied an option for 15 acres of cemetery land, Child Associates' professional recommendation taking all factors into account was that 15 acres of cemetery land would effectively destroy the Estate, diminishing its value as historic open space and making its restoration a remote prospect.

However, the permanent protection of the Estate would not happen without a fight. The primary opponent of the permanent protection of the Brooks Estate was naturally the Oak Grove Cemetery Board of Trustees, the municipal agency charged with oversight of the Estate. On April 29, 1994, Richard Beston, Superintendent of the Oak Grove Cemetery, issued a press release entitled, "No

More Sales of Graves at Oak Grove Cemetery after the Year 2000." Mr. Beston attacked the entire Child Report process, claiming that it was biased against the cemetery's needs. In his statement, Mr. Beston noted that there were more than 90 acres of park land in Medford and that the MDC controlled one-third of Medford's land as open space recreation. Finally, Mr. Beston stated that the City of Medford would lose "twenty million dollars" in revenue if the Cemetery were not allowed to use the fifteen acres. Charles Marelli, Chairman of the Oak Grove Cemetery Board of Trustees, joined the counterattack, arguing the Child Report "does not take into consideration the needs of the community and totally ignores its citizenry."

Support for the preservation of the Estate was not unanimous. Some residents whose families have been buried at Oak Grove Cemetery voiced their opposition against saving the Brooks Estate for open space recreation, wanting the opportunity to have themselves and future generations buried at the same cemetery.

The battle raged on for several years and became one of the most debated issues in Medford's recent history. BEPA and its supporters focused on the big picture, arguing strongly that by dividing up the Estate with cemetery uses and without permanent protection, its eventual restoration would never take place. Finally, on August 5, 1997, after months of meetings, the Medford City Council unanimously passed Resolution 96-044 (offered originally by Councilor Robert M. Penta) to permanently protect the 50-acre Brooks Estate through adoption of the Conservation and Preservation Restriction for the property. The Restriction itself had been honed over the course of 32 meetings of the Council's Zoning Sub-committee. Seven acres of the Estate nearest the current Oak Grove Cemetery and across the historic Access Drive, were reserved for future cemetery expansion, with a 50-foot vegetative setback for aesthetic purposes. The cemetery land was also set back from Grove Street by 100 feet so that the appearance of the Estate was wooded land, not graves. A major milestone for the Brooks Estate – permanent protection - had been achieved more than 40 years after it was initially proposed as a bird sanctuary by the Brooks family, but the hard work was just beginning.



1998 signing of the Conservation and Preservation Restriction at the Brooks Estate with Mayor Michael J. McGlynn and the Medford City Council.

Recent History (M-BELT 1998-2010)

The creation of M-BELT required a much different structure than had previously existed in regards to the management of the Brooks Estate. For decades prior to 1998, the Brooks Estate was under the jurisdiction of the Oak Grove Cemetery and both the landscape and buildings were largely allowed to fall into disrepair. The passage of the Conservation and Preservation Restriction created a public-private partnership dedicated to protecting, managing and restoring the Brooks Estate. The City of Medford retains ownership of the Estate, as it has since 1942. Under the Restriction, M-BELT functions as the manager of the property, in charge of the day-to-day operations and works in partnership with the City of Medford to raise funds, submit grants and move the restoration of the Brooks Estate forward.

The Conservation and Preservation Restriction forbade any development on the Estate and committed the City of Medford to the long-term restoration of the Brooks Estate. It also brought several important state-level stakeholders into the oversight of the Estate, signifying the importance of the Brooks Estate to not only the City of Medford, but also the Commonwealth of Massachusetts: The Massachusetts Historical Commission, The Trustees of Reservations; and the Department of Conservation and Recreation, all three of whom are Grantees of the Restriction.

The public-private partnership between the City of Medford and the activists who worked so hard to save the Estate was reflected in the creation and make-up of the Board of Directors of the Medford-Brooks Estate Land Trust (M-BELT), the 501(c)3 non-profit that was created in the legislation and charged with overseeing the restoration of the Brooks Estate. The M-BELT Board is a mix of appointed and elected volunteers with members appointed by the Mayor, City Council, Medford Historical Society and Medford Historic Commission and the remainder elected from the M-BELT membership, including the President position.

The basics of the public-private partnership that developed over the next decade were that the City of Medford would provide funding and resource support where possible, while the M-BELT volunteers do the heavy lifting and project execution. For example, many grants for the Brooks Estate buildings and landscape were prepared by M-BELT and submitted under the City of Medford's signature. All studies and construction projects initiated since 1998 were developed and managed by M-BELT. M-BELT has primarily worked with the Office of Community Development on most major projects, but other city agencies have also been involved, including the Purchasing Department, Department of Public Works, the Medford Police and Fire Departments, the Oak Grove Cemetery and the Office of Human Diversity. One of the primary financial tools used to fund Brooks Estate projects was the City of Medford's Federal Community Development Block Grant (CDBG) program, under the oddly-defined category of "slums and blight". Given the Shepherd Brooks Manor and Carriage House's dilapidated state in 1998, this definition successfully worked for many years.

It is also worth noting that M-BELT has raised and spent several hundred thousand dollars donated by members and friends. These funds have been used for planning, small construction projects and basic repairs of the Estate and Manor. In addition, M-BELT members, friends and Medford

residents have contributed thousands of hours of in-kind volunteer labor for clean-ups, painting, and trail and building maintenance.

For the past decade, M-BELT has tackled the monumental task of planning the restoration of the Brooks Estate landscape and historic buildings. Reviewing the list of planning documents at the end of this chapter, one will find a half-dozen landscape and architecture studies covering all aspects of the Estate.

For the Manor and Carriage House, M-BELT has successfully managed a dozen major construction projects totaling over \$1,000,000 in improvements since 1999, including a restored slate and copper roof, chimneys, restored windows, new oil tanks and boiler, two new toilets and the recently-completed two-story west porch restoration.

A major challenge for the restoration of the Brooks Estate was to determine a way for the Estate to be financially self-sufficient in the long-term, while maintaining its historic integrity and environment. This was something that took many years of planning to determine; the exact uses of the historic buildings were not known at the time of the Conservation and Preservation Restriction in 1998. The battle to save the Brooks Estate from 1993-1998 was primarily about the land, not the buildings, which no one from BEPA had ever stepped inside before 1998.

After years of studying the buildings and their potential both in terms of dollars and for the environment of the Estate and needs of the larger Medford community, M-BELT determined that restoring the Carriage House as a multi-purpose function facility would provide the Estate with long-term financial independence while still respecting and reinforcing the values of the historic open space estate. The Shepherd Brooks Manor, while still an important historic work of architecture, has far less financial capacity than the Carriage House, which can be rented for a variety of functions, including a medium-sized, 75-80 person sit-down wedding, post-funeral gathering or any of a dozen other potential social and community uses. The Manor would serve to support the Carriage House functions and also provide Medford with much-needed small meeting space at its historic first floor Parlor, Library and Dining Room.

Membership and Outreach

M-BELT has a sizeable membership, comprised of Medford residents, people from adjoining towns and supporters from eight other states. Approximately 80% of M-BELT's membership consists of Medford residents.

M-BELT has planned and executed scores of events at the Brooks Estate over the past decade, including the annual spring and fall clean-ups, the annual summer picnics, dozens of bird and history walks, open houses and other on-site events designed to highlight the Estate's history and natural beauty. Clean-ups typically involve tasks such as landscaping, trail maintenance, indoor and outdoor work at the Manor, cleaning, and other volunteer-appropriate tasks.



Volunteers at a spring clean-up

M-BELT also undertook significant outreach to the community through the publication of over thirty newsletters, creation of a website (www.brooksestate.org), a Facebook page, sponsoring dozens of slide shows, M-BELT Annual Meetings (where updates were given to the membership), and attendance at public events such as Clippership Day, the Herring Run Festival, Tufts Community Day, and many others.



M-BELT's website home page

M-BELT has worked with many community groups over the years to connect with like-minded groups that share our vision of the Estate, including the Friends of the Fells, The Royall House Association, the Medford Public Schools, the Medford Historical Society, the Medford Public Library, the Medford Historical Commission, the Menotomy Bird Club (Arlington), the Victorian Society of Malden, The Trustees of Reservations, the Massachusetts Historical Commission and the Department of Conservation and Recreation (the last three being Grantees of the Conservation and Preservation Restriction).

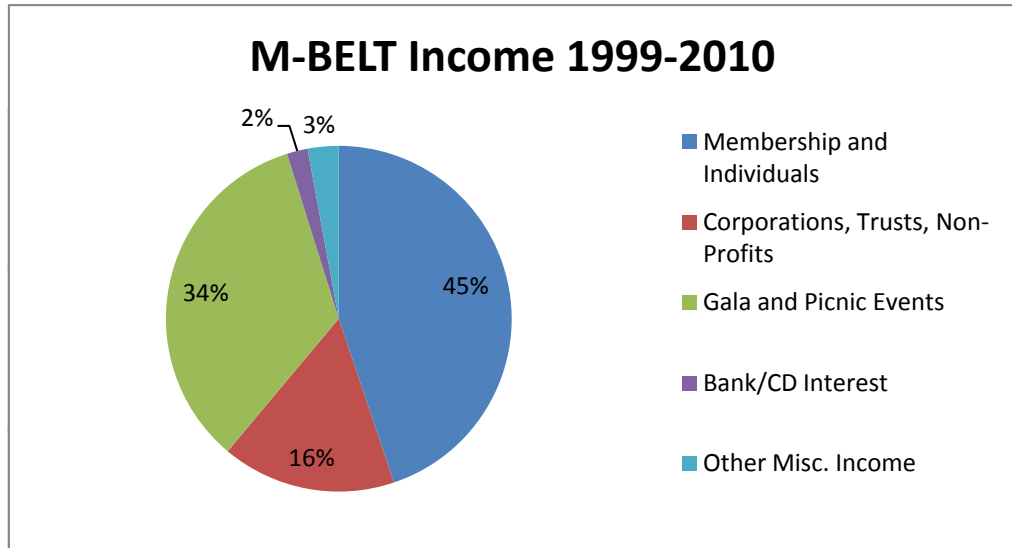
M-BELT Finances and Financial Commitments

M-BELT has raised and spent over \$260,000 in private funds directly on the Brooks Estate over the past decade through the generosity of its members. Most of the funds donated to M-BELT have been through membership dues, individual donations, and public fundraising events. These funds have been used for a variety of purposes:

- Construction Projects - direct financial contributions to various Manor and Carriage House construction projects, including the restoration of the Manor slate roof, windows, chimney and toilet reconstructions. This represents the single largest percentage of M-BELT's funds at 38% of the total and points to M-BELT's commitment to moving the restoration of the Brooks Estate forward with public and private funds.
- Planning / Consultants - M-BELT paid for historic preservation design services on several projects to help defray their costs, including the Manor window and chimney restoration projects. M-BELT has also paid for professional consultants for a variety of services as they were needed for the planning and design of the Brooks Estate buildings and landscape, including landscape design, wetlands engineering, cost estimating, structural design, business planning, and CAD drawings. All of these professionals were needed to provide a specific expertise to their respective project, and accounted for 23% of the total M-BELT funds spent.
- Manor Maintenance - M-BELT has invested tens of thousands of dollars into the City of Medford-owned twenty-room, 10,000 square feet Shepherd Brooks Manor through regular maintenance projects including floor refinishing, security and alarm system, plumbing and boiler repairs, interior and exterior painting, regular cleaning, landscape equipment and energy efficient light fixture replacements. Decades of deferred maintenance on the Manor contributed to the large size of the M-BELT funds spent on maintenance, 19% of the total.
- Administrative costs - a very small percentage of M-BELT's funds - 12% - are dedicated to administrative costs such as the post office box rental, postage, telephone service, website maintenance, printing costs, photocopying, bank accounts, and presentation expenses. This number is kept low by the many volunteer hours and donations made by M-BELT members.

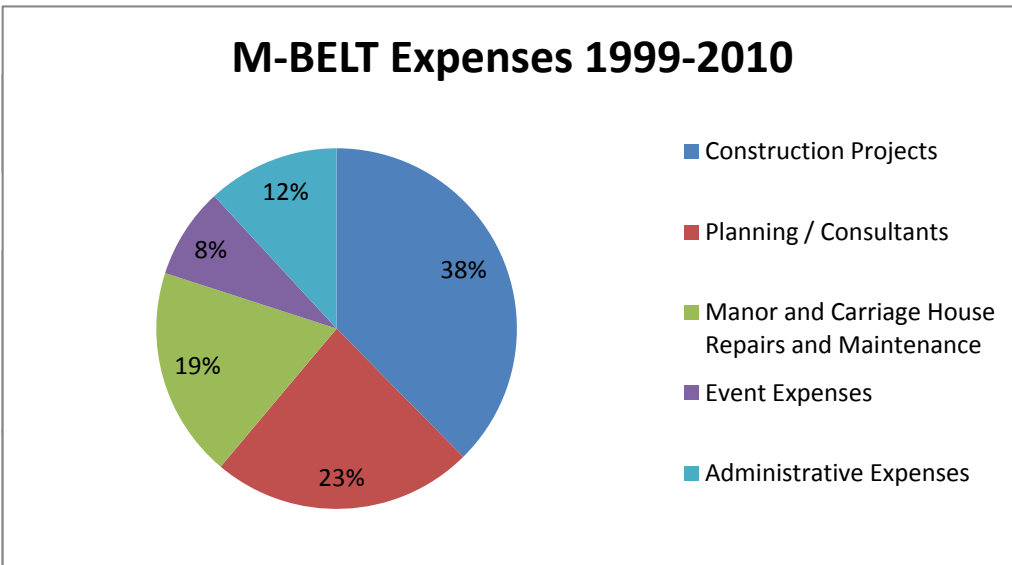
M-BELT Income 1999-2010

Membership and Individuals	\$130,663
Corporations, Trusts, Non-Profits	\$47,430
Gala and Picnic Events	\$99,264
Bank/CD Interest	\$5,687
Other Misc. Income	\$8,424
Total Income	\$291,468



M-BELT Expenses 1999-2010

Construction Projects	\$98,643
Planning / Consultants	\$61,644
Manor and Carriage House Repairs and Maintenance	\$49,468
Event Expenses	\$21,383
Administrative Expenses	\$31,123
Total Expenses	\$262,261



Brooks Estate Master Plan
 Medford-Brooks Estate Land Trust
 1 September 2011

M-BELT Summary Income 1999-2010

Year	Type of Income					Total Income
	Individual Memberships	Corporations, Trusts, Non-Profits	Gala and Picnic Events	Bank/CD Interest	Other Misc. Income	
1999	\$24,816	\$6,655	\$0	\$67	\$0	\$31,538
2000	\$11,279	\$3,500	\$12,366	\$93	\$0	\$27,238
2001	\$15,643	\$35,100	\$12,981	\$1,652	\$0	\$65,376
2002	\$11,109	\$0	\$11,560	\$1,778	\$2,645	\$27,092
2003	\$9,087	\$1,000	\$13,539	\$696	\$1,147	\$25,469
2004	\$9,775	\$175	\$14,707	\$360	\$395	\$25,412
2005	\$6,967	\$0	\$14,179	\$337	\$0	\$21,483
2006	\$8,352	\$0	\$11,119	\$550	\$1,600	\$21,621
2007	\$7,953	\$0	\$2,673	\$49	\$2,400	\$13,075
2008	\$8,658	\$1,000	\$1,831	\$43	\$237	\$11,769
2009	\$8,672	\$0	\$2,184	\$46	\$0	\$10,902
2010	\$8,352	\$0	\$2,125	\$16	\$0	\$10,493
Totals	\$130,663	\$47,430	\$99,264	\$5,687	\$8,424	\$291,468

M-BELT Summary Expenses 1999-2010

Year	Type of Expenses					Total Expenses
	Construction Projects	Planning / Consultants	Manor and CH Repairs & Maint	Event Expenses	Administrative Expenses	
1999	\$0	\$645	\$8,178	\$2,369	\$1,357	\$12,549
2000	\$20,000	\$0	\$2,769	\$923	\$1,690	\$25,382
2001	\$21,863	\$0	\$1,680	\$2,725	\$2,739	\$29,007
2002	\$0	\$10,500	\$3,189	\$3,161	\$3,986	\$20,836
2003	\$23,820	\$10,244	\$6,586	\$2,519	\$3,178	\$46,347
2004	\$9,092	\$15,338	\$4,853	\$3,111	\$2,407	\$34,801
2005	\$4,729	\$8,937	\$1,400	\$2,831	\$4,513	\$22,410
2006	\$0	\$13,600	\$5,615	\$3,391	\$3,499	\$26,105
2007	\$0	\$1,900	\$6,750	\$0	\$2,787	\$11,437
2008	\$3,329	\$0	\$2,851	\$0	\$1,188	\$7,368
2009	\$12,820	\$0	\$4,447	\$153	\$1,312	\$18,732
2010	\$2,990	\$480	\$1,150	\$200	\$2,467	\$7,287
Totals	\$98,643	\$61,644	\$49,468	\$21,383	\$31,123	\$262,261

Summary of Major Manor and Carriage House Construction Projects 1998-2010

No.	Year	Project Description	CDBG Contribution	M-BELT Direct Financial Contribution	M-BELT In-Kind Contribution	Total Project Cost	Comment
1	1998 - 2004	Manor and Carriage House Stabilization	\$0	\$0	\$3,000 In-kind Design and Proj. Management	\$120,000	Multi-year stabilization of Shepherd Brooks Manor and Carriage House by private design - build company Classic Restorations. Scope included stemming leaking roofs and saving failing west porch, restoring Carriage House main door and a dozen other repair and restoration projects, all 100% donated labor.
2	1999	Manor - Second Floor Bathroom Reconstruction	\$5,400	\$9,600 Construct. materials, direct labor	\$4,000 In-kind Design and Proj. Management	\$15,000	Project was completed after Manor plumbing failed. M-BELT contributed design, project management and labor for all non-plumbing construction.
3	2000	Manor - Slate Roof Restoration - Phase 1	\$100,000	\$21,800 Contribution to Construction costs	\$15,000 In-kind Project Management	\$333,000	Project was funded by a combination of Mass. Preservation Project Funds (\$100,000), Mass. State Legislature (\$100,000) CDBG & M-BELT funds.
4	2001	Manor - Verandah Roof Restoration	\$0	\$20,000 M-BELT paid 100% of construction costs.	\$1,000 In-kind Design and Proj. Management	\$20,000	Project was prepared and executed solely by M-BELT, using contractor and staff from main roof.
5	2002	Manor - Slate Roof Restoration - Phase 2	\$91,000		\$12,000 In-kind Project Management	\$91,000	Phase 2 of slate, copper roof restoration over northern 2-story wing of Manor.
6	2003	Manor - Window Restoration	\$93,150	\$47,850 \$15,000 architect & \$32,850 construction	\$8,000 In-kind Project Management	\$141,000	Restoration of 70 windows with all-new shutters, interior storms; restoration of three non-historic exterior doors to original windows.

Summary of Major Manor and Carriage House Construction Projects 1998-2010

No.	Year	Project Description	CDBG Contribution	M-BELT Direct Financial Contribution	M-BELT In-Kind Contribution	Total Project Cost	Comment
7	2005	Manor - Chimney Restoration	\$30,000	\$2,000 Preservation Architect	\$4,000 In-kind Project Management	\$32,000	4 of 5 Manor chimneys restored in 2000-2001; 5th chimney was missing 15 feet and had to be recreated in this separate project.
8	2005	Manor - Oil Tank Replacement	\$5,575		\$2,000 In-kind Design and Proj. Management	\$5,575	Build 2 new oil tanks in Manor basement
9	2007	Manor - ADA Accessible Toilet and Electrical Upgrades	\$40,000	\$3,000	\$8,000 In-kind Design and Proj. Management	\$43,000	New ADA-accessible toilet on Manor first floor serving general public. Electrical upgrades were overseen by City of Medford Building Department.
10	2008	Carriage House - Roof Stabilization Project	\$15,000		\$2,000 In-kind Design and Proj. Management	\$15,000	Replacement of "temporary" roof from 1990s after it failed.
11	2009	Manor - Boiler Replacement Project	\$0	\$12,820	\$1,500 In-kind Design and Proj. Management	\$15,000	New boilers in basement of Manor to replace 30-year old boiler on its last legs
12	2010	Manor - West Porch Restoration	\$180,000 \$30K Preserv. architect		\$10,000 In-kind Proj. Management	\$180,000	Construction costs were \$150,000. Complete reconstruction of 2-story west porch; recreation of historic details from photos.
Total			\$560,125	\$95,270	\$67,500	\$1,010,575	

Notes:

- 1 In-kind M-BELT contributions are not counted as part of the total project cost
- 2 No City of Medford general funds have been expended on any of the above listed projects

Summary of Major Planning Projects - 1999-2010

No.	Year	Project Description & Planner	CDBG Contribution	M-BELT Direct Financial Contribution	M-BELT In-Kind Contribution	Total Proj. Cost	Project Description
1	2001	Historic Core Landscape Conceptual Design Study performed by Elmore Design Collaborative	\$9,000 Dept. Environ. Protection Grant	\$3,000 M-BELT contributed 25% of total cost of planning project	\$3,000 In-kind Proj. Management	\$12,000	Complete conceptual landscape design for the 7.5 acres of land around the Manor and Carriage house.
2	2002	Conceptual Design Report on the Brooks Estate Grant awarded by Harvard Graduate School of Design Community Fellowship Program - Lucinda Statler, landscape designer	\$0	\$15,000 M-BELT wrote and received the matching Grant from the GSD	\$5,000 In-kind Project management	\$15,000	Conceptual landscape design for the entire Brooks Estate, except the Historic Core and Ponds/Access Drive. Detailed plans to detail with Grove Street buffer, Point of Rocks area, Meadow/Cemetery area.
3	2004	Carriage House Conceptual Design Report Grant awarded by Harvard Graduate School of Design Community Fellowship Program - Michelle Prata, intern architect	\$0	\$6,000 M-BELT wrote and received the matching Grant from the GSD	\$2,000 In-kind Design & Proj. Management	\$6,000	Project created a detailed set of architectural drawings for design and pricing, including existing and proposed demo & architectural plans and elevations, sections details and finishes.
4	2005	Brooks Pond Study	\$0	\$20,600	\$5,000	\$20,600	Complete landscape design focusing on the Access Drive and Ponds, the two areas of the Estate not covered by the previous landscape studies above

Summary of Major Planning Projects - 1999-2010

No.	Year	Project Description & Planner	CDBG Contribution	M-BELT Direct Financial Contribution	M-BELT In-Kind Contribution	Total Proj. Cost	Project Description
		David Szlag & Associates, Landscape Architect.		M-BELT funded the Pond Study entirely with M-BELT funds	In-kind Project management		
5	2007	Manor & Carriage House Business Plan Susan Brophy	\$0	\$17,000	\$3,000	\$17,000	Restoration of 70 windows with all-new shutters, interior storms; restoration of three non-historic exterior doors to original windows.
Total			\$9,000	\$61,600	\$18,000	\$70,600	

Notes:

- 1 In-kind M-BELT contributions are not counted as part of the total project cost
- 2 No City of Medford General funds were expended on any of the above listed projects