

Business Plan for the Patton Homestead

March 2019



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Executive Summary

The Patton Homestead is a unique community resource open for private events, public programming, and public use. The Town envisions many uses for the Homestead – active and passive recreation; educational, cultural and social events; meetings; presentations; entertainment; exhibitions; tours; ceremonies; and celebrations. Through strategic partnerships with the Wenham Museum, Patton Homestead Inc. (PHI), the Hamilton Historical Society, and others the Patton Homestead will become a center of activity. Following the vision developed and put forth by PHI, the Patton Homestead will preserve history; honor veterans; and welcome community. This three-pronged vision sets the Homestead apart from its competition.

An operating budget has been proposed for the 2020 financial year, beginning on July 1, 2019. The expenses are expected to total \$152,343.08. This includes the personnel expenses and operating expenses, which includes nearly \$42,000 indirect costs that accrue back to the town general fund.

The projected revenue for FY20 includes \$6,000 in lease payments from the Wenham Museum; \$30,000 from retained earnings; and an expected \$30,000 in event revenue. The remaining \$86,343.08 is our request of the Annual Town Meeting.

This plan exhibits a number of possible combinations of revenue generating events to cover the \$30,000 in FY20. Additionally, the plan projects revenue growth in each of the successive years, leading to a plan for sustainability of the Homestead in Year 3, or FY2022, so that the Town will not need to fund the operating expenses at the Homestead in future years.



Patton Homestead Overview

The Patton Homestead is owned and managed by the Town of Hamilton, MA. The historic property consists of a c. 1786 house (with later editions of the north and south wings), barn, stables, 4 sheds, and 23 acres of former farmland. Today the land includes rolling hills of open space, wooded forestland, and wetlands abutting the Ipswich River. Over the Ipswich River are both a small boat launch and a bird-watching platform. There are two designated parking lots: an upper lot between the house and stables, and a lower lot between the house and the Patton Ridge development.

Other Players

The Wenham Museum, an independent 501(c) 3 nonprofit owns and manages the Patton Family Archives and rents exhibition and collection storage space at the Patton Homestead. They are located in the south wing of the Homestead. The mission of the Wenham Museum is to protect, preserve and interpret the artifacts of childhood, domestic life, and the history and culture of Boston's North Shore (wenhammuseum.org).

Patton Homestead Inc. (PHI) is an independent 501(c) 3 nonprofit organized to assist the Town of Hamilton with fundraising and programmatic support for the Patton Homestead. The mission of Patton Homestead Inc. is to support and preserve the historic Patton Homestead as a community asset and to provide educational, recreational and cultural opportunities (pattonhomestead.org).

The Hamilton Historical Society is a 501(c) 3 nonprofit organization, now located in part of the middle section of the north wing of the Patton Homestead. The Hamilton Historical Society was founded in 1961 with the following goals: to arrange stimulating programs relating local history for its membership and friends; to disseminate as widely as possible the history of Hamilton; to serve as a meeting place for those who enjoy local history; to preserve artifacts relating to Hamilton; to support research and publication of books and articles relating to Hamilton; and to publish a society bulletin containing news of to the society's coming events and material pertinent to the interest of society. Its recent move to the Patton Homestead is expected to help the HHS in carrying out its mission and raise its visibility within the community. Please visit hamiltonmahistoricalsociety.org for more information.

History (Patton Homestead Inc., pattonhomestead.org)

1786-1927: The home that would become the Patton Homestead was built in 1786 and due to the surrounding lush meadows, was named "Green Meadows." In 1928, the siblings of Beatrice Ayer Patton surprised Beatrice and her husband, General George S. Patton, Jr. with the purchase of the Green Meadows property.

1928-1945: The Pattons and their four children enjoyed Green Meadows as their home base while the family was still traveling and residing elsewhere due to the military commitments of General Patton. They planned to return to Green Meadows right after the end of WWII, but General Patton's untimely death in 1945 meant that his wife, Beatrice, would then preside over Green Meadows alone.

1945-1953: Beatrice made the Homestead a welcoming place for friends and relatives to enjoy her rose gardens and displays of military memorabilia. The land was a regular route for the Myopia Hunt in which Beatrice was a participant. In 1953, Beatrice had a heart attack while riding in the hunt, which unfortunately ended her life.

1953 – 1980: At the time of his mother’s death, General George S. Patton IV was serving in Korea. He and his wife, Joanne Holbrook Patton, a fifth-generation army daughter, and their family took over the Homestead. The Pattons continued to enjoy the Homestead during summers and on vacation, but George wanted to finish his military career, which required living and traveling abroad.

1980 – 2012: Joanne Patton and General George S. Patton IV lived in the Patton Homestead and it is where they continued the raising of their 5 children. Together they developed a Community Supported Agriculture (CSA) organic farm project at Green Meadows. In 2004, her husband George died and Joanne continued to live in the Homestead and to oversee Green Meadows Farm as a thriving CSA. Joanne generously welcomed others to enjoy the estate and Homestead, hosting outings for Operation Troop Support, West Point and various other colleges. She was director of the Hamilton-Wenham Community Center for many years. Joanne has been an active member of the Hamilton Community and has contributed generously to the town’s public life and events.

Post 2012: Joanne Patton’s generous gift to Hamilton in 2012 of the Patton Homestead and 27 acres of land bordering on the Ipswich River is now realizing the vision that many have hoped. Plans, renovations and fundraising of the Homestead for public use are underway.



After the gift was accepted, the Board of Selectmen appointed a Board of Incorporators to study the Homestead and recommend how it could best serve the town. That Board is now the Patton Homestead Inc.

non-profit. In March 2017 they submitted recommendations for management of the site to the Selectmen. Since then the non-profit team has been working closely with Town Manager and his staff to implement those recommendations.

A first step was to build a parking lot. That was completed fall 2017 and townspeople are welcome to park there and enjoy the grounds. Also in the fall of 2017 the town requested bids for an architect to engineer the renovations and develop a design for the Homestead’s use for a variety of historic, social, and other events.

Spencer & Vogt (now Spencer, Sullivan, & Vogt) was selected based on their considerable experience in renovating historic places for public use. Their draft designs were presented to the Selectmen in March 2018. SS&V’s designs were developed into construction drawings for bidding the renovation work in July 2018. Construction began in the fall of 2018. The first phase of external renovations has been mostly completed so that the Homestead can be ready for use later this spring 2019.

PHI's Vision (Patton Homestead Inc., pattonhomestead.org)

How will a renovated Patton Homestead benefit the town of Hamilton? Already the town can use the grounds for a variety of activities such as hiking and picnics in the summer and snow shoeing and cross-country skiing (on the tracks laid by the North Shore Nordic Association that keeps their grooming equipment at the Homestead) in the winter. The first annual "Snow Day at Patton Homestead" was surprisingly successful in January 2018 even though there was no snow! Nearly a hundred visitors stopped by, mostly families with children. And even though no snow, the kids had a great time running the grounds, rolling down the hills, climbing on the cannon and toasting marshmallows.

There is also a small dock where canoes or kayaks can be launched into the Ipswich River. The town is cooperating with the Essex County Greenbelt for a nature trail to connect with their other properties along the River.

When the Homestead is renovated, townspeople will have a delightful historic property for a variety of meetings and events – class reunions, family parties, weddings, lunches and dinners, lectures, concerts, and so on. The house can currently accommodate up to 49 people inside for events and over 100 outside. And there is a lovely patio, complete with an early 1620's Spanish military cannon, overlooking the grounds for outdoor and evening events.

To recognize the Patton family's military history and Joanne's devotion to veterans, a major consideration for the Homestead is to serve our military families and veterans. A major effort will be made to invite and encourage them to take advantage of this historic military home.

In fact that is already happening. For the past several years the Wenham Museum has rented the grounds for their Military History Day. Last July nearly 1,000 visitors came to the Homestead for all kinds of military activities – military reenactments, displays of military memorabilia, and military vehicles including a tank. The highlight of Military History Day in 2017 was the landing of a Blackhawk helicopter on the Patton grounds.



The Homestead will also be a national attraction as Mrs. Patton is working with the Wenham Museum to maintain the Patton archives and memorabilia in their present location. Almost one third of the Homestead is devoted to these materials and the Wenham Museum will provide access to them by military history researchers and scholars as well as public tours of the Patton rooms.

Designs have been finished for Phase 1 exterior renovations, which include restoration of the exterior (dormers, windows, stone work, roofing, painting, etc.). Designs are underway for upgrading of utilities (electrical, plumbing, heating, air conditioning, lighting, etc.); installing fire sprinklers; making entrances, rooms, and bathrooms handicapped accessible; providing a serving kitchen for caterers; and refurbishing the interior spaces.

How will we afford the renovations? The town has funds in hand from the sale of 4.5 acres of the property for moderately priced housing, as stipulated in the gift agreement. Public and private grant funds are being actively pursued. A \$200,000 grant request was approved at Town Meeting for the Town's Community Preservation funds for historic preservation, which went toward funding the exterior improvements which are now mostly completed. Within the next few months a capital campaign will begin to raise additional funds.

Following Phase 1 renovations, there is more to be done for the full development of the Patton Homestead and landscape including an exterior courtyard and accessible pathways. Plans are underway for that and will be supported solely through fundraising.

The good news is that no taxpayer funds are being used for any of these activities, except for CPC funding. In fact, the Patton Ridge 12 units of senior housing bring in \$145,000 in tax revenue to the town, much more than the \$34,000 when Mrs. Patton lived there! That additional revenue helps bring down the average tax bill for every homeowner in town.

Furthermore, the land sale generated:

- \$156,000 for affordable housing and immediately allowed the Town to fund the two new Habitat for Humanity houses on Asbury Street,
- and \$500,000 in a Town stabilization for natural or turf recreation fields.

The generosity and foresight of Joanne Patton's gift has provided the seed money for getting things started. And the expectation is that the Patton Homestead will be fully self-supporting. When all is said and done, Hamilton will have a wonderful and unique resource and venue for resident activities. And for that we can thank our benefactor, Mrs. Joanne Holbrook Patton.

Location(Town of Hamilton, hamiltonma.gov)

The Patton Homestead is located at 650 Asbury Street, Hamilton, MA 01982. Hamilton, MA is a rural-suburban town in the eastern central portion of Essex County in eastern Massachusetts, United States. At the 2010 census, it had a population of 7,764. Currently the town has no manufacturing industry and no industrially-zoned land.

Its location on the North Shore of Massachusetts provides easy access to the Atlantic seashore with its reservations, beaches and boating. The town includes many historic houses, pastoral landscapes, and old stone walls that accompany winding tree-lined roads. It also has a rich equestrian heritage, which remains strong due to the influence of the many horse farms and of Myopia Hunt Club, which holds frequent equestrian events, including polo most Sunday afternoons. (Myopia also hosts a Thanksgiving Day fox hunt each year that the public may attend). Thus, the visitor to Hamilton may well share the secondary roads with horse and pony riders.

Hamilton is closely tied to neighboring Wenham, sharing a school system, library, recreation department, station and newspaper. In 2010, the community of Hamilton-Wenham was listed among the "Best Places to Live" by Boston Magazine.

Hamilton includes South Hamilton, which is that part of Hamilton that the Postal Service has assigned the zip code 01982. "Hamilton" and "South Hamilton" are indistinguishable from each other except for the difference in zip codes.

Management Team

Patton Homestead Director: In February 2019 the Town of Hamilton hired Kaleigh Paré as the first director of the Patton Homestead. She has a master's degree in museum studies and experience working in historic house museums. Her past positions involved public programming and community outreach, collections management, and education programs for preschoolers through senior citizens. She has additional experience serving on the Board of Trustees for another historic home and farm and fundraising for other community organizations. She comes with a network of connections within the cultural sector. She reports to the Town Manager.

Hamilton Town Manager: Joseph Domelowicz has been the Town Manager in Hamilton since September 2018, but his municipal governance experience includes time on the Economic Development Committee in the city of Chelsea, four years as a municipal services coordinator for the Metropolitan Area Planning Council, six years in Winthrop, where he served as the Assistant Town Manager in charge of grants and economic development. While in Winthrop he helped the town purchase and develop the business plan for a town-owned and operated ferry to Boston and worked with the local business community on plans to redevelop and revitalize the downtown business district, among other projects.

Department of Public Works: Timothy Olson is the Director of Public Works with the Town of Hamilton. He has nine years of public works experience, seven of which with the Town of Rockport, MA and two with the Town of Hamilton. He was a Bachelor of Science degree in civil engineering and nine years of previous experience in engineering. He reports to the Town Manager.

Opportunity

The Patton Homestead is a unique community resource open for private events, public programming, and public use. The Town envisions many uses for the Homestead – active and passive recreation; educational, cultural and social events; meetings; presentations; entertainment; exhibitions; tours; ceremonies; and celebrations. In addition, the Wenham Museum and the Hamilton Historical Society (tenants within the north and south wings of the house) coordinate their own activities, such as tours, lectures, research opportunities, and other events. All three organizations, the Patton Homestead, the Wenham Museum archives, and the Hamilton Historical Society should benefit from their proximity to each other in the shared space.

Private events

The Patton Homestead house, grounds, and stable are available to be rented out for private events for large and small groups. (See Appendix A for recommended fee schedule)

1. Meeting Space: The historic house at the Patton Homestead has a current building capacity of 49 people. The downstairs contains 3 rooms which can be closed off or left open to create one large room around the staircase and fireplaces. The space is suitable for business meetings, lectures, or networking events and can be rented out as such.
2. Formal Events: The Patton Homestead is a beautiful location to hold special events. Examples of such events could include weddings, baby and bridal showers, retirement parties, military commissioning ceremonies, and other formal ceremonies and receptions. Outdoor locations are available for both ceremonies and receptions, including: the rose garden, meadow, stables, and the back patio/yard.
3. Informal Events: The Patton Homestead and its 23 acres is a unique space to hold informal events by private groups. These types of events could include class reunion picnics, scout camping trips, pop-up pubs in the stables, public events hosted by other organizations, and many other possibilities.

Public Programming

The potential for public programming at the Patton Homestead includes both paid and free admission events open to the general public and organized by the Town of Hamilton. Keeping with the vision set forth by PHI, public programming will fall into one (or more) of three themes: preserving history, honoring veterans, and welcoming community. This is a broad vision for the Patton Homestead that can include many possible public programs. Some ideas include: kite flying, military history celebrations, lectures, beer and food truck festivals, guided nature walks, and more. The Patton Homestead is in a position to partner



with other Town departments such as the Council on Aging and the Recreation Department to organize public programming.

Public Use

The 23 acres of outdoor space at the Patton Homestead are available for public use such as cross country skiing, snowshoeing, or sledding in the snowy months, and birding, walking, and accessing the Ipswich River during the warm months. The grounds are open to the public for their use when other events are not taking place. The public may access the Patton Homestead grounds between sunrise and sunset.



SWOT Analysis

Strengths	Weaknesses
House, Stables, Barn 23 acres of open, undeveloped space Patton name Patton Family Archives Architectural significance River access	New endeavor, starting from scratch Not yet financially self-sustaining Rooms in house are small Not (yet) reaching accessibility standards
Opportunities	Threats
Rustic/ barn weddings are popular right now Combining PH, WM, and HHS in one building PHI support	More established venues and organizations Not all residents support Town ownership

Target Market

The target market for the Patton Homestead can be broken into two groups, local communities and veterans, military members, and their families.

First, as a town owned property the primary audience is the residents of the Town of Hamilton. Secondly to Hamilton residents are the residents of neighboring towns, such as Wenham, Topsfield, Ipswich, Essex, Manchester-by-the-Sea, and other towns in Essex County, Massachusetts.

The other major audience group consists of military members and their families. This group is not necessarily constrained by geography, as interest in the Patton family is both national and international.

Competition

The Patton Homestead faces competition for its audiences from other not-for-profit, for-profit, and municipal facilities with similar offerings. Below are two charts detailing the competition for the Patton Homestead as a venue for private events, such as weddings, and for public programming and public use.

Spencer, Sullivan, & Vogt (ssvarchitects.com) compiled a list of wedding venues with a rustic setting, similar to the stables at the Patton Homestead. See Appendix B for details.

For organizations offering similar programs to what the Patton Homestead can and will offer, see Appendix C. This list includes nonprofits and municipally owned properties; organizations close by and from across the country.

Our Advantages

The Patton Homestead distinguishes itself because it is uniquely positioned to offer such a wide variety of uses, where the most of sites listed above specialize in one or two of the uses listed here. The Patton Homestead has 23 acres of grassy hills, wood area, and river access, as well as the historic house, barn, and stables. It is a beautiful venue for formal events and casual affairs for private use. Its land is available for open use and organized programming. The connection to the Patton Family positions the Homestead as a special site for military history, veterans and their families. There are no other competing venues offering all that the Patton Homestead has for its community.

Execution

Marketing Goals

1. Promote Patton Homestead for private rentals, public programming, and public use of the site.
2. Increase public awareness, participation, and support for the Homestead.
3. Develop and implement media and community relations contact list.

Tools and Contacts

PH communications	Media	Community Relationships	Third Party Listings
Patton Homestead website	Hamilton-Wenham Chronical	Catering companies (Chive, etc.)	Essex National Heritage Area
Patton Homestead Inc. website	Salem News	Veterans' organizations	North of Boston CVB
Email blast	Northshore Magazine	Hamilton-Wenham Mother's Club	Historic Places for Historic Parties
Brochures	Hamilton Community TV	Artists	Northshore Macaroni Kid
Social media (Facebook, Instagram, Twitter)	Boston Globe North	Essex County Greenbelt	Yelp
Surveys	Newburyport News	Ipswich River Watershed Association	Trip Advisor
	Wicked Local for other area towns	Northshore Chamber of Commerce	
	Boston media stations	Bay State Military Installations	

Approach

The bulk of the marketing efforts for the Patton Homestead will be no and low cost actions to increase public awareness, participation, and support. Public events can be listed for free with local newspapers, magazines, and online calendars. Local media can also be invited to feature the Patton Homestead in stories. The design, printing, and distribution of brochures will be the highest cost. Below are three options.

Staples	Vista Print	Minuteman Press
1,000 ct, glossy, color, tri-fold	1,000 ct, glossy, color, tri-fold	1,000 ct, glossy, color, tri-fold
\$359.99	\$250 original (\$187.49 sale)	\$235

Word of mouth is the strongest recommendation and it depends on relationship building. Relationships can be built with neighboring organizations and organizations and businesses working to

achieve similar missions or business goals. Reviews on social media and third party websites will depend on community experiences and customer service. This can be done without a lot of money put into marketing.

Networking and making our presence known will be the one of the biggest tasks in the first few years of operation. Those involved with the Patton Homestead, including town employees and the PHI board, will actively bring the Homestead to the community in order to welcome the community to the Homestead. Some activities to achieve this include, attending networking events sponsored by North Shore Chamber of Commerce, Essex National Heritage, Essex County Community Foundation, and other similar organizations. Participation at community events, such as local fairs and festivals, with a booth to offer information on the Patton Homestead to event attendees will also increase our reach.

Financial Plan

Proposed FY20 Budget

Town of Hamilton FY20 Patton Homestead Operating Budget	7/1/16 – 6/30/17	7/1/17 – 6/30/18	1/1/19 – 6/30/19	7/1/19 – 6/30/20
	FY17 Actuals	FY18 Actuals	FY19 Budget	FY20 Budget
PERSONNEL SERVICES	-	-	29,695.00	59,826.08
EXPENSES	56,072.13	33,676.08	63,316.00	92,517.00
Total Expenses	<u>56,072.13</u>	<u>33,676.08</u>	<u>93,011.00</u>	<u>152,343.08</u>
Revenues				
Wenham Museum Lease Payment (\$500/month)			3,000.00	6,000.00
Event Revenue			-	30,000.00
Unreserved Fund Balance			-	30,000.00
Net			<u>90,011.00</u>	<u>86,343.08</u>
Personnel				
95030 510010 PERMENANT WAGES	-	-	29,270.00	58,971.00
95030 510076 MEDICARE	-	-	425.00	855.08
Total Personnel	-	-	<u>29,695.00</u>	<u>59,826.08</u>
Operating Expenses				
95030 520010 UTILITIES / FUEL CHARGES	6,570.68	9,990.25	6,262.00	13,000.00
95030 520040 REPAIR & MTC BLDGS / GRDS	33,675.60	14,135.40	5,500.00	5,500.00
95030 520095 CUSTODIAL SERVICES	265.00	-	3,400.00	5,000.00
95030 530011 LITIGATION SERVICES	11,293.00	4,027.50	3,000.00	3,000.00
95030 530015 CONSULTATIVE SERVICES	-	2,649.67	2,500.00	7,500.00
95030 530040 VOICE DATA & VIDEO SERVICE	1,849.53	1,995.50	2,244.00	3,575.00
95030 530041 ADVERTISING & PRINTING	133.60	563.74	5,600.00	3,000.00
95030 540020 OFFICE EXPENSES	-	-	6,400.00	1,400.00
95030 540060 BLDGS & GRDS SUPPLIES	2,284.72	314.02	2,000.00	2,000.00
95030 570010 TRAVEL	-	-	200.00	750.00
95030 570030 DUES/ BOOKS /SUBSCRIPTIONS	-	-	500.00	500.00
95030 570040 P&C INSURANCE	-	-	-	-
95030 570081 OTHER EXPENSES	-	-	5,000.00	5,000.00
95030 590001 DIRECT/ INDIRECT COSTS	-	-	20,710.00	42,292.00
Total Operating Expenses	<u>56,072.13</u>	<u>33,676.08</u>	<u>63,316.00</u>	<u>92,517.00</u>
TOTAL	<u>56,072.13</u>	<u>33,676.08</u>	<u>93,011.00</u>	<u>152,343.08</u>

Revenue

The above FY20 Patton Homestead Operating Budget forecasts revenue of \$66,000. That total can be broken down into three parts. The Wenham Museum's lease payments are \$550 per month, or \$6,600 per year. The Unreserved Fund Balance is \$30,000 for the fiscal year. The remainder of \$30,000 will be earned revenue. This can be achieved by the following break downs.

Type of event	Anticipated Revenue	Number needed to reach goal	Comments
Saturday Outdoor Wedding (or similar event)	\$350/hr X 8hr = \$2,800 (see Appendix B)	11/yr (10.7)	
Sunday Outdoor Wedding (or similar event)	\$350/hr X 8hr = \$2,800 (see Appendix B)	11/yr (10.7))	
Friday Outdoor Wedding (or similar event)	\$250/hr X 6hr = \$1,500 (see Appendix B)	20/yr	
Thursday or Friday Night Pop-Up Pub (or similar event)	\$100/hr X 5hr = \$500	60/yr	
Mid-Week Meeting (or other similar indoor event)	\$75/hr X 4hr = \$300 (see Appendix B)	100/yr	
Two Hour Public Programs (lectures, school visits, etc.)	\$10/child \$15/adult \$20/adult	3,000 children/yr 2,000 adults/yr 1,500 adults/yr	Not counting speaker fee (if applicable)



Possible Combinations of Events throughout FY20 to Reach Goal

Combination	Activity & Cost	Activity & Cost	Activity & Cost	Activity & Cost	Total
Combination A	12 Pop-Up Pubs (2/month X 6months May-October) \$6,000	6 Saturday Weddings (or similar events) \$16,800	12 lectures with 25 adults paying \$20 each \$6,000	1 Sunday wedding (or similar event) \$2,800	\$31,600
Combination B	12 mid-week daytime meetings (one/month) \$3,600	6 Saturday Weddings (or similar events) \$16,800	3 Friday Night Weddings (or similar events) \$6,000	12 lectures with 25 adults paying \$15 each \$4,500	\$30,900
Combination C	8 Pop-Up Pubs (each week July/August) \$4,000	4 Saturday weddings (or similar events) \$11,200	3times, 3-day (8hr each day), midweek rental (conference,etc.) \$5,400	4 Sunday weddings (or similar events) \$11,200	\$31,800
Combination D	3 Sunday weddings (or similar events) \$8,400	4 Saturday weddings (or similar events) \$11,200	3 Friday evening weddings (or similar events) \$4,500	14 (summer weeks) of Pop-Up Pubs (or similar events) \$7,000	\$31,100

Decision Points for Evolving the Business Plan

Now is the start of Year 1 for events and programs at the Patton Homestead. Keeping this in mind and knowing that reality does not always go as planned, we have established three points of time to evaluate and reassess, if necessary, the progress for revenue generation at the Patton Homestead. Each of these check points are an opportunity to assess where we are in relation to the plan and to make adjustments if needed.

1. *Late August 2019:* This first evaluation comes at the end of the summer months and prior to the start of the fall. Both the summer and fall are expected to be the busiest months of activity. Therefore, late August will be about half way in between the busiest months. At this time we will be able to reassess and make additional plans for the fall

months if the summer was not as successful as planned. At this time we will also assess the fee schedule if needed.

2. Late November 2019: This second evaluation comes at the end of the fall and the start of the expected slower months of activity.
3. Late January 2020: This is the halfway point in the fiscal year and prior to budget development for FY21. At this time we will know how to adjust the expected revenue for the next fiscal year, as well as the remainder of the current year during the spring months.
4. Early April: After the Annual Town Meeting we will make adjustments to and finalize the schedule of events for the upcoming summer and fall.

Growth for year two (FY21) and three (FY22)

The goal is to bring in more revenue each year over about three years to eventually be self-sustainable. The expenses for FY20 are \$152,343.08 and the projected revenue is \$66,000 (see above). In FY21 we will grow the revenue to \$96,000, an additional \$30,000 above the revenue for FY20. Then in FY22 we plan to raise revenue again to \$153,000 to cover the expenses.

Assuming that the Wenham Museum continues to rent space in the south wing for their archive storage and exhibition, this revenue will hold steady at \$6,000 per year.

Proactive budget management will result in some unreserved fund balances year to year. Any additional revenue needed can be made up with sponsorships and grants, which together will cover revenue for the year.

Earned revenue from events and possible grants to cover special projects will cover the remainder of the revenue for the Patton Homestead in FY21 and FY22. Below are possible combinations of revenue generating events.



Possible Combinations of Events throughout FY21 to Reach Goal

Combination	Activity & Cost	Activity & Cost	Activity & Cost	Activity & Cost	Activity & Cost	Total
Combination A	12 Pop-Up Pubs (2/month X	12 Saturday Weddings (or similar	12 lectures with 25 adults paying	25 mid-week meetings (or similar	3 Sunday Weddings (or similar	

	6months May-October) \$6,000	events) \$33,600	\$20 each \$6,000	events) \$7,500	events) \$8,400	\$61,500
Combination B	12 mid-week daytime meetings (one/month) \$3,600	18 Saturday Weddings (or similar events) \$50,400	12 lectures with 25 adults paying \$15 each \$4,500	1 Friday wedding (or similar event) \$1,500		\$60,000
Combination C	9 midweek 8hr event rentals (conference, retreat, etc.) \$5,400	10 Saturday weddings (or similar events) \$28,000	14 of Pop-Up Pubs (or similar events) \$7,000	12 lectures with 25 adults paying \$20 each \$6,000	6 Sunday weddings (or similar events) \$6,400	\$63,200
Combination D	3 Sunday weddings (or similar events) \$11,200	10 Saturday weddings (or similar events) \$28,000	5 Friday night weddings (or similar events) \$7,500	26 midweek, daytime 4hr meetings (or similar events) \$7,800	12 lectures with 25 adults paying \$20 each \$6,000	\$60,500

Possible Combinations of Events throughout FY22 to Reach Goal

Combination	Activity & Cost	Activity & Cost	Activity & Cost	Activity & Cost	Activity & Cost	Total
Combination A	26 Pop-Up Pubs (each week May-October) \$13,000	26 Saturday Weddings (or similar events) Each week May-Oct. \$72,800	12 lectures with 48 adults paying \$20 each \$11,520	25 mid-week daytime meetings(or similar events) \$7,500	6 Sunday Weddings (or similar events) \$16,800	\$121,620
Combination B	26 Pop-Up Pubs (each week May-October)	30 Saturday Weddings (or similar events) Each week May-	12 lectures with 48 adults paying \$20 each	12 midweek, daytime meetings (or similar events)	3 Sunday weddings (or similar events)	

	\$13,000	Oct. \$84,000	\$11,520	\$3,600	\$8,400	\$120,520
Combination C	10 Friday night weddings (or similar events)	14 Saturday weddings (or similar events)	12 lectures with 48 adults paying \$20 each	50 midweek meetings (or similar events)	12 Sunday weddings (or similar events)	
	\$18,000	\$39,200	\$11,520	\$15,000	\$33,600	\$117,320
Combination D	12 Pop-up Pubs (or similar events)	26 Saturday Weddings (or similar events) Each week May- Oct.	9 lectures with 48 adults paying \$15 each	12 Sunday weddings (or similar events)		
	\$6,000	\$72,800	\$6,480	\$33,600		\$118,880

Grants and Sponsorships

Grants and sponsorships are valuable tools to supplement the cost of special projects from preservation to programming. Granting agencies will lay out an application for potential grantees, award money for chosen projects (often as a reimbursement after completion), and expect a final report at the end of the project. Businesses and individuals may sponsor a particular project by donating money with the expectation their gift will be publicly acknowledged. These gifts often are given before the project takes place. Through partnerships established through the Northshore Chamber of Commerce, the Essex County Community Foundation, and other networking groups, we expect to work with local and regional businesses that will help defray the costs of activities at the Patton Homestead through their sponsorship of events and projects. Both grants and sponsorships are useful for reducing costs of projects. Below are lists of potential funders for projects at the Patton Homestead over the next few years.



Funder	Amount	Type of Project	Deadline for Application	Website
US Embassy	\$5,000 -	Cultural affairs re:	April 19,2019	https://www.grants.gov/web/grant

Belgium: Public Diplomacy	\$50,000	75 th Anniversary of the Battle of the Bulge		s/view-opportunity.html?oppld=313058
NEH: Infrastructure & Capacity Building	Up to \$750,000	Buildings, equipment, digital infrastructure	May 15, 2019 (draft due April 3 rd)	https://www.neh.gov/grants/preservation/infrastructure-and-capacity-building-challenge-grants
Essex County Community Foundation: Creative County Initiative	Up to \$30,000	Creative Place- Making	Likely letters of interest due in May 2019 and then applications in June 2019	http://eccf.org/CCI-placemaking-grant-guidelines
Hamilton – Wenham Cultural Council		Cultural events and projects	October 15, 2019	https://www.mass-culture.org/Hamilton-Wenham
Historic New England: Community Preservation	\$1,000	preservation	2019 dates not yet released	https://www.historicnewengland.org/helpful-links/awards-programs/community-preservation-grants/
Massachusetts Cultural Facilities Fund	Cap: No limit set F&T: \$50,000 matching SR: \$7,000 matching	Capital Feasibility & Technology Systems Replacement	2020 dates not yet released	http://www.massculturalcouncil.org/facilities/facilities_guidelines.htm
Essex National Heritage Area: Partnership Grants	\$2,000 matching	Education Preservation Interpretation	Mid-February 2020	https://essexheritage.org/grants

Appendix A

Recommended Fee Schedule

Appendix B

Spencer, Sullivan, and Vogt list of wedding venue
competition

Appendix C

Program Competition List