The hen’s tooth stone wall is one of a variety of walls the Case sisters constructed on their property. The row of trees was planted by Donald Wyman during his 37-year tenure as Director of the Arnold Arboretum. This is one of the beautiful meadow landscapes that many see from busy Wellesley Street. This snapshot encapsulates the essence of the Case Estates: Located in the "heart" of Weston, the land evokes the memory of more rural days, and yet it provides the vision of a natural place for all ages to enjoy for future generations.
Case Estates Review Committee  
Report to Selectmen  
May 17, 2006

Table of Contents

I. Summary of Recommendations ................................................. 4
II. The Case Estates ...................................................................... 11
III. A Timeline ............................................................................ 12
IV. Making The Case for Case ....................................................... 14
V. Land Use Plans (by Carol R. Johnson & Associates) .................... 16
VI. Funding Recommendations and Considerations ......................... 22
VII. Recommended Guiding Principles for Management ................... 26
VIII. Closing .............................................................................. 29

Appendices

Appendix 1 Committee Charge and composition .................................. 31
Appendix 2 Future Town Municipal Needs ....................................... 33
Appendix 3 Report from the Park and Cemetery Department and Notes from Meeting at Mount Auburn Cemetery, February 24, 2006” ............................................................. 40
Appendix 4 Town-wide mailing, January 2006 .................................... 45
Appendix 5 Horticultural Report ...................................................... 47
Appendix 6 Map #1 Existing Land Use  
Map #2 Build-out Plan  
Map #3 Land Use Plan  
Map #4 Land Use Alternatives  
Map #5 Potential Land Use Development ........................................ 52
Appendix 7 Where will the proceeds from the sale go? ....................... 57
Appendix 8 Principles Guiding the Case Fund .................................. 58

Note: This Report is also available at www.weston.govoffice/com.  
Go to “Inside Town Government” and continue to “Town Committees”
CASE ESTATES REVIEW COMMITTEE

Voting Members
Appointed by Selectmen

Kay McCahan, Chair
Norm Berg
Zibby Ericson
Bill Gallagher
Winky Merrill
Dusty Reeder
Bill Stevenson

Liaisons from Town Boards

Michael Harrity
Board of Selectmen

Brian Donahue
Conservation Commission

Bob Fronk
Historical Commission

Joan Parrish
Housing Needs Committee

Pam Fox
Planning Board

Representative from Private Conservation Organizations

Tom Selldorff
Weston Forest & Trail Association

Meg Kelly
Land’s Sake

Cynthia Berg
Weston Land Trust

Special Consultant to Committee

Harold Hestnes
Case Estates Review Committee  
Report to Selectmen  
May 17, 2006

The Case Estates Review Committee was established in June of 2005 and was charged with advising the Board of Selectmen regarding the potential acquisition, future use and funding for some or all of the Case Estate property for municipal purposes, open space, historic preservation, and/or affordable housing uses. The complete charge and composition of our committee is included in Appendix I. This report constitutes a summary of our committee’s work and concludes our charge.

I. Summary of Recommendations

Recommendation #1: Take ownership of the Case Estate property in the Fall of 2006.

We strongly recommend that the Town of Weston obtain ownership of the Case Estates property this Fall. Unless we do so, it is our understanding that Harvard will sell the property to another party and we will have forever lost the opportunity to control the outcome of a critical parcel of open space. Harvard has proposed a price of $27 million for the Case Estates and has indicated a desire to close on the sale late this year. Therefore, it is a matter of urgency that there should be a vote on this recommendation at a Town Meeting in the Fall of 2006.

The plot plan below represents the 62-acre property and its natural features as it exists today (this map entitled “Existing Conditions” is also reproduced on a larger scale in Appendix 6).
By right, a developer working within our zoning laws could build as many as 29 homes on the acreage. The map below shows what this full “build-out” could look like (reproduced on a larger scale in Appendix 6).

In order to prevent this scenario, we must first and foremost purchase the property in its entirety so that the town can determine its future.

We must state that in the best of all worlds it would be our committee’s first choice to preserve the Case Estates in its entirety and maintain it in much the same way we see it today. Below is a vision of what the property might look like, with trails, if preserved in perpetuity (this map is reproduced on a larger scale in Appendix 6).
We recognize, however, the significant financial challenges involved in making this vision a reality, and therefore we have had to make some very difficult choices relating to dividing the property into parcels ("parcelizing") and priority setting. Since the acquisition costs for the property are so high, we have concluded that several different funding sources will be needed to buy the Case Estates. To allocate different funding sources to different parts of the property, our committee parcelized the property in order to create priorities.

The map on the following page shows the parcels we have identified (larger map in Appendix 6). The parcels and the funding sources we are recommending for purchasing each are listed below.
A) Historic Hillcrest Corridor

We have identified a high value corridor for preservation through both sides of the Case Estates. We have called it the “Historic Hillcrest Corridor” to reflect that the roots of this historic property go back to the era of Miss Case’s vision of Hillcrest Farm and Hillcrest Gardens. This corridor is valuable for its combination of unique features including:

- Open space,
- Historic landscapes,
- Passive recreation opportunities including an extensive trail system,
- Natural resources and wildlife habitat,
- Unique vistas of changing landscape forms,
- Lovely roadside landscapes.

The corridor is a continuous swath forming a vital physical connection to Land’s Sake’s agricultural fields to the east and to the Ash Street reservoir to the south. Trails and a woodland cart path connect to conservation land, cemetery land and the elementary schools to the north. Preservation
of the corridor, within the acquisition of the entire property, is an important recommendation of this report. The committee considers this corridor to be the part of the property that represents the highest preservation value to the community.

Community Preservation funds should be used for permanent protection of as much of the Hillcrest Corridor as possible. A vote should be taken on using CPA funds to purchase this open space corridor at Town Meeting in the Fall of 2006. These lands would then be protected as open space in perpetuity. In the event the CPA funds are insufficient to pay for the entire corridor, the committee recommends that the extra acreage be characterized as “lands subject to change” and be added to the next category described in the section below.

B) Lands subject to change

We have classified lands not included in the preservation corridor as “lands subject to change”. The future use of these lands should be determined by the Town of Weston after we have acquired the property.

The five areas designated as “lands subject to change” are as follows:

- An area of land adjacent to Alphabet Lane that could be designated as a 50-60 car parking area serving visitors to the Case Estates, the schools and the community center (approximately 1.2 acres);

- The “Pine Woods” – approximately 14 acres of hillside landscape that lies between the Hillcrest Corridor and municipal school property;

- Northeast Lot. An approved residential building lot located south of 101 Wellesley Street that abuts the free standing stone wall built by the Case sisters and contains some of their rhododendrons;

- The South Meadow – an area of approximately 10 acres along Ash Street.

- Southwest Lot. An approved residential building lot located south of 137 Wellesley Street.

These portions of the Case Estates should be purchased using short-term (2 year) borrowing. This will allow additional time for future study. There are at least four funding sources that the town could consider in the future for these areas:

- Fundraising to purchase conservation land;
- Long-term bonding of funds to purchase lands for permanent municipal use;
- Long-term bonding of funds to purchase lands for permanent conservation;
- Income from the sale of lands for limited development with conservation restrictions.
C) The three buildings

There are three buildings on the property: a yellow brick barn, a schoolhouse and a farmhouse. The future of these buildings needs further study. All three are of historic interest. All three are currently being improved and stabilized by Harvard.

The three buildings should also be purchased using short-term (2 year) bonds. This will allow more time for additional study of the buildings and the options for their future use. This is a complex issue. Some of the options for the buildings could include:

- Use by a town department or organization
- Sale with preservation restrictions
- Affordable housing
- Relocation

Editor’s Note: The following recommendations are considered “follow-up recommendations” because they are predicated on Recommendation #1.

Follow-Up Recommendation #1: Private fundraising should begin immediately.

A “Case Fund” is in the process of being established. The Weston Land Trust has voted to provide $10,000 to begin the formation of the Fund which will be a nonprofit 501(c)(3) dedicated to raising funds for the acquisition of the Case Estates and future management obligations. Every effort should be made to maximize the extent to which private fundraising can offset the amount of public money needed for the purchase in Fall of 2006. See Appendix 8 for principles guiding the Case Fund. We recommend that the Selectmen set up systems to work with this new organization to ensure that it enhances the public goals and operates in an effective manner.

Follow-Up Recommendation #2: Continue to work with Carol R. Johnson and Associates to address the buildings as they relate to the surrounding land acquisition.

The present contract with Carol R. Johnson, Associates has been completed. We think the Selectmen may want to continue to use this firm as consultants up to and during Fall Town Meeting. The Selectmen should consider extending their services. Besides the presentations at public meetings and Town meeting that might be appropriate, we are concerned that not enough work has been done around the issues of the buildings and accompanying land acquisition. When the Selectmen need to establish exactly which lands should be purchased with CPA funds, it will be necessary to have some idea of the land associated with the buildings and the land deeded as open space to the Historic Hillcrest Corridor. CRJ Associates should be able to give more clarity to this issue.
**Follow-Up Recommendation #3:** Appraisals of the parcels must be sought.

We are in full support of the Selectmen as they continue to negotiate with Harvard on a final price that fairly represents the value of the property. The Selectmen are very aware that a great deal of work needs to be done on appraisals, not just of the entire property but also of the individual portions of the property. An appraisal of the Historic Hillcrest Corridor will need to be done in order to ascertain its worth. The CPA funds that are available for this acquisition will need to be matched with this appraisal number. If there is a gap in funding, the Selectmen will need to decide how to deal with this issue.

Appraisals for all of the other portions of the property will also be necessary information in further studying how to deal with the eventual disposition of all land outside the Historic Hillcrest Corridor, the "land subject to change." We note this here only to indicate that this is an important issue that needs attention and that we support a funding recommendation for these appraisals at 2006 Annual Town Meeting in May.

**Follow-Up Recommendation #4:** If the property is acquired in the Fall of 2006, the Selectmen should appoint a new committee (Case Estate Review Committee II) to study and make recommendations regarding the “lands subject to change” and the three buildings.

This committee should be charged with making recommendations relating to the “lands subject to change” and the three buildings to the Selectmen in May, 2007. Limited development, affordable housing, and purchase using fundraised money should be considered. Also, this committee should evaluate the possibility of issuing long-term bonds for the purchase of municipal land.

**Summary:** The recommendation to take ownership of the Case Estate property in the Fall of 2006 and the follow-up recommendations we have presented above will:

- Allow the town, rather than a developer, to determine the fate of the Case Estates;
- Allow the town to vote to permanently protect all or a significant part of the “Hillcrest Historic Corridor” using CPA funds and fundraised money;
- Provide time for a newly appointed committee (CERC II) to study and make recommendations as to the use and final disposition of the “lands subject to change” and the three buildings purchased with short-term funds;
- Provide time to fund-raise;
- Allow the town to place development constraints, conservation restrictions and other desirable controls on portions of land that may be sold at a future date;
- Allow the town to place constraints, preservation restrictions, and/or affordable housing restrictions on the buildings that may be retained by the town or sold at a future date.
II. The Case Estates

The 62 acre Case Estates is one of the last large parcels of open space in the town of Weston. The property is comprised of two parcels in “Case Corner” historic district – one on the northwest side of Wellesley Street and another between Wellesley and Ash Streets. Owned by the Case sisters through the early 1900’s the property was farmed until they bequeathed it to Harvard University in 1944. Harvard managed it until the early 1990’s as part of the University’s Arnold Arboretum. The property is a prominent historic landscape with many unusual horticultural plantings and it provides viewscapes that are a reminder of Weston’s rural history as a farm community. It includes two houses and a brick barn on the north side of Wellesley Street.
III. A Timeline

- On April 11, 2000 the Board of Selectmen of the Town of Weston wrote to Dr. Robert E. Cook (Director of the Arnold Arboretum) saying “we are prepared to enter into formal discussions with Harvard University for the purpose of the Town obtaining control and/or ownership of the land in Weston now owned by Harvard and commonly known as the Case Estates. The letter states, “As you know, we have recently completed a review of the undeveloped land in Town and have established a priority for the acquisition of land for both conservation and municipal purposes. The Case Estates property is the first priority of the town in terms of possible additions to the Town’s open space.” See Appendix 9 for portions of the study done by the Committee to Advise Selectmen on Land Acquisitions, 2000.

- On January 12, 2005 Robert E. Cook, Director of the Arnold Arboretum of Harvard University, informed Weston’s Board of Selectmen that he and his associate, Jim Gray, Director of Harvard Real Estate, were prepared to meet to discuss the sale of the Case Estates to the Town of Weston.

- Subsequently, the Board of Selectmen established our committee known as the Case Estates Review Committee. The committee was charged with advising the Board of Selectmen regarding the potential acquisition, future use and funding for some or all of the Case Estate property for municipal purposes, open space, historic preservation, and/or affordable housing uses. The charge and composition of our committee is included in Appendix I. This report constitutes a summary of this committee’s work and concludes our charge.

- On July 7, 2005 the Case Estates Review Committee had its first meeting and has been meeting on a regular basis since that time. Committee minutes and agendas for our meetings are posted on the web at www.weston.org.

- On July 13, 2005 representatives from Harvard including Jim Gray and Bob Cook met for the first time with representatives from Weston including Michael Harrity, Harold Hestnes and Kay McCahan. It was agreed to share all information including wetlands delineations and soil analysis. Specific appraisal numbers were not discussed. Subsequently, Harvard provided the committee with a copy of the soil analysis report and the analysis that they had done on the buildings.

- During the Fall of 2005, committee representatives gathered information from town officials regarding the potential for Case lands to satisfy foreseeable future municipal needs. The results of this study are presented in Appendix 2. A report from Weston’s Park and Cemetery Director, Bill O’Neil is in Appendix 3.

In summary, a need was identified for additional parking along Alphabet Lane. Playing fields are being addressed in other ways. A study of future cemetery needs indicated that Linwood would run out of room for casket burials in 50 years. The director of the cemetery suggested one way to address this issue was to reexamine the problem when the Woodland School needed future replacement or renovation. The new school could be built on the northern hillside/pine woods section of the Case land if the town decides to keep this area as a municipal purpose parcel. Then the cemetery could be expanded onto the Woodland School site. This would mean that new cemetery options would be adjacent to the old which makes operations more efficient.
This type of discussion about town needs as far as 50 years into the future highlights the need to think long term and recognize the advantage of retaining municipal purpose land for flexibility in the future.

- On November 14, 2005 the Case Estates Review Committee held a public meeting showing our draft land plan. We also outlined our findings as of that date.

- During the first week in January 2006 a letter reviewing the Case Estates issue was sent to all households in Weston. See Appendix 4 for a copy of this letter.

- By January 2006 we had developed much of our background material with the committee still waiting to hear a price from Harvard. After a debate about moving ahead on obtaining the services of a land planner without a sale price, the committee decided to engage Carol R. Johnson Associates (CRJ). The land plans created by CRJ in collaboration with the committee are an important part of this report and are included in the Summary of our Recommendations and in Appendix 6.

- On March 7, 2006, Harvard presented Weston with an appraisal by LandVest, Inc. indicating a value for residential development of $27,000,000. The Weston Selectmen intend to do appraisals so there can be a discussion about this number. Harvard also indicated it wanted a decision from the town regarding the purchase of the Case Estates by the Fall of 2006. Negotiations on the sale are in the hands of the Board of Selectmen. All proceeds from the sale will go to the Harvard Arboretum in Jamaica Plain (see Appendix 7 and/or http://www.arboretum.harvard.edu/aboutus/aboutus.html Click on “Long Range Planning and Facility Needs”).
IV. Making The Case for Case

The Case Estates is more than just 60+ acres of land. It is a great educational, recreational, historical, agricultural, and natural resource, unique to Weston and to the region. For more than a decade the future of the Case Estates has been uncertain. Now we have the opportunity to control what happens to this special place.

The Heart of Weston

The Case Estates is located in the geographical heart of Weston, at the junction of four well-traveled roads: Wellesley, School, Newton and Ash Streets.

To the north is the “Case Campus,” including the Weston Public Library, Case House, Community Center, and three elementary schools. To the east are the open, cultivated fields of the Land’s Sake community farm. To the south is the popular Weston Reservoir loop trail. To the west, a network of trails connects to other open space, most notably the Highland Town Forest and Linwood Cemetery.

These connections are not just good for people. They also serve as a natural wildlife corridor.

The Case Estates land consists of meadows, pine woods, wetlands, orchards, and gardens. Together, these varied landscapes create a uniquely beautiful place at the spiritual “heart” of our community.

Weston’s Number One Priority since 1996

The Case Estates has been singled out as the town’s #1 priority in all land planning studies beginning with the 1996 Open Space and Recreation Plan. In 2000, the primary recommendation of the Committee to Advise the Selectmen on Land Acquisition (CALA) was to secure the future of the Case Estates. In 2002, after Weston passed the Community Preservation Act, the new Community Preservation Committee studied town needs and again put the Case Estates at the top of the list for acquisition.

All three studies looked at existing conservation land and remaining undeveloped parcels and concluded that we need to be highly selective in acquiring additional acreage. Desirable characteristics included prominent location, scenic views, trail connections, wildlife habitats, relationship to historic buildings, and contribution to rural character. The Case Estates has all these attributes.

The Historic Hillcrest Corridor

The Case Estates has a long history as a regional horticultural center. We are approaching the centennial anniversary of Hillcrest Farm, which Marion Case created in 1909 as a model farm where she could promote local agriculture. Miss Case purchased three adjacent farms and preserved the historic farmhouses and pastoral landscape. She employed local boys and instilled in them a love of nature and the land. In 1920, she changed the name of her unusual enterprise to Hillcrest Gardens, reflecting an increased interest in horticulture and gardening. Marion Case willed Hillcrest to the Arnold Arboretum, and her sister Louisa also chose the Arboretum to inherit the adjacent estate.
developed by their parents. The Arboretum continued its stewardship of the land, using it for educational programs, display gardens, and as a holding nursery. This brief history begins to explain what is so special about the property. It harks back to the time when Weston was an agricultural community. Superimposed on this background are the embellishments added by Marion Case and the Arboretum, for example, the magnificent spring flowering trees, rhododendron gardens, and unusual stone walls.

### A Community Resource

All three elementary schools use the Case Estates for a variety of science and social studies activities. The Superintendent of Curriculum for the Weston Public Schools notes "We value our local resources and recognize the importance of education in a natural setting. To this end, we integrate the natural world as much as possible with the elementary curriculum." The Case Estates is within walking distance of the Scout House.

For older citizens, the property is adjacent to the Council on Aging facilities at the Community Center and close to the Brook School Apartments.

Weston shares an interest in protecting important landscapes with the neighboring towns of Concord, Wayland, Lincoln, and Wellesley. As development pressures increase in the western suburbs of Boston, properties such as the Case Estates become increasingly rare and important to our town – and indeed to the wider geographic region. The variety of landscapes and extensive network of trails will become a unique recreational asset that will enhance the attractiveness of Weston as a place for families to live.
V. Land Use Plans

Prepared by:
Carol R. Johnson Associates, Inc.
115 Broad Street
Boston, MA. 02110

Project Purpose and Process

In February 2006, the Town of Weston CERC hired Carol R. Johnson Associates, Inc. (CRJA) to perform two tasks: 1) review the Land Use Plan developed by CERC, particularly in terms of environmental constraints, views, significant plantings, municipal parking, and options for the three historic buildings on the site, and 2) prepare two alternative conceptual schemes for future land use.

These conceptual schemes were intended to maximize preservation of significant views, historic features, and natural resources, but also to integrate other options for municipal use or land use, some which could help defray the cost of the property acquisition. What these options are is to be further studied and defined at a later date, but initial consideration included possible municipal parking, housing and residential development, and future replacement site for an existing school. Reserving land for future cemetery expansion was determined not to be needed at this time, or for the foreseeable future.

CRJA reviewed all background material and base plans provided by the Town, including property history, soil suitability studies, building structure studies, horticultural survey, as-of-right residential development plans, site feasibility studies, and CERC meeting minutes. CRJA attended two meetings with the CERC, one being a workshop involving other town staff and representatives, followed later by a meeting where CRJA presented plans and recommendations to the committee.

CRJA reviewed the Land Use Plan prepared by ARC for the CERC dated 2005, generally agreed with the plan, and incorporated some recommended changes into the new plans developed by CRJA, as will be described below.

CRJA prepared and presented to The CERC four (4) final plans as follows:

- Existing Land Use
- Land Use Plan
- Land Use Alternatives
- Potential Land Use Development

Map #1. Existing Land Use

The 62.2 acre site is located in the center of Weston at the juncture of Wellesley, Newton and Ash Streets. Wellesley Street separates the property into a 40.6 acre parcel on the north and a 21.6 acre parcel on the south. The site is bounded by Ash Street and wetlands to the south,
Newton Street and Alphabet Lane to the east, Woodland School to the north, residences and wetland along the west. The site lies across the street from the Community Center and municipal buildings along Alphabet Lane, and is just north of the Weston Reservoir on Ash Street.

The property lies entirely within the Town’s Residence A Zoning District and has four (4) approved ANR lots along the north side of Wellesley Street.

The 40-acre north parcel has three historic buildings fronting on Wellesley Street (Barn, Schoolhouse, and House), gently rolling open fields along the street and behind the houses, and a large hillside of mature pine woods to the north. The 20-acre south parcel has mostly gently rolling open fields to the north, and a south meadow area with some trees from an old orchard nursery.

Wetlands on and adjacent to the site are shown approximately per the 1992 Development Constraints plan by Matlock Associates. (Wetlands had not been field delineated or surveyed at the time of this project.) There are large areas of Bordering Vegetated Wetlands along the western and southern perimeters of the site which have associated 100-foot buffers with local and state regulations limiting disturbance in these areas. There is also a small isolated area of wetlands on the south parcel abutting Wellesley Street which was assumed to have an associated 100-foot Buffer of no-disturbance. These wetlands and Buffer Zones are shown on the plans.

Topography on the site is a significant constraint only on the north parcel within the Pine Woods area where many of the north and west facing slopes are extremely steep, ranging from 10% – 20%. A definitive topographic survey of the site would be required to confirm exact location and extent of these steep slopes.

Soils on the site, as evaluated and mapped per the 2005 Soil Suitability Assessment by Meridian Associates, do not appear to present a significant constraint for septic systems or site development, in general. There are occasional areas of ledge and boulder outcrops, mostly in the north parcel near the top of the hill.

While the 2006 report by Cheryl Lowe determined there were no horticulturally unique plantings left on the Case Estates property, there is much vegetation on the site that is special and is a large part of the beauty of the place. What defines much of the site’s character is the large continuous areas of open grass meadows running east-west connecting the north parcel to the south parcel. There is a significant stand of mature deciduous specimen trees at the “nose” at the Wellesley Street/Newton Street /Ash Street intersection on the south parcel, and there is the large mature stand of pines on the north parcel. Some of the old orchard trees remain on the south parcel, but these generally are not in good shape. There is a nice grouping of evergreen trees in the middle of the south meadow of the south parcel. There is a collection of large rhododendron shrubs on the east side of the north parcel underplanted along the edge of the woods.

There are major views into the site across open fields from along Wellesley Street looking both north and south, from along Newton Street looking west into the “nose”, and from Ash Street
looking west. Some views are constrained by overgrown vegetation along Wellesley Street and Ash Street, and from the large yew hedge that is surrounding the old teaching garden behind the historic house along Wellesley Street. Views from the site are particularly nice from the top of the hill on the north parcel looking west.

The site is laced with trails and fire roads, as noted on the plans. The trails run east to west over the open fields and meadows, and north to south through the pine woods and south meadow. The major trail connections are to the wetland on the west side of the north parcel, to the cemetery and Woodland School on the north, to Ash Street and ultimately the Weston Reservoir to the south, and to Land Sakes and the municipal buildings on the east. These trails and their connections and views are a major amenity on this site.

Special man-made features include historic stone walls along Wellesley Street, and one which is up to 12 feet tall located near Alphabet Lane, as noted on the plans. There is an old stone chimney and summer house on the north parcel, and an apple cider cellar on the south parcel which is in poor condition.

The three historic buildings along Wellesley Street are on the National Register of Historic Places. These buildings are in various conditions as documented in the 2005 Architectural Assessment by Perry and Radford Architects. These structures were the heart of the operations of the old Hillcrest Farm and consequently appear to be a significant part of the Case Estates historical legacy and character. There is a driveway and parking area associated with these buildings.

An “Historic Hillcrest Corridor” has been indicated on the CRJA plans, which is a designation for the area of the site which runs east to west on both the north and south parcels, which includes the most significant and historic structures, open fields, views, trees, plantings, and trails. This represents the core and major part of the identity of the property.

(Nota: Map #2 is a Build-Out Plan not provided by CRJA)

**Map #3. Land Use Plan**

This plan shows the Case Estates property, preserving the entire property as it is with some minor improvements. The major elements of the plan include:

**Preserve:** Historic Hillcrest Corridor;

All major stands of trees, open fields, rhododendron area, teaching garden north of Wellesley Street;

All trails and trail connections;

All three historic buildings, considering adaptive reuse for housing or non-profit use;
All views into and out of site;

All manmade special features (stone walls, chimney, etc)

**Improve:**

Parking area for up to 60 cars along Alphabet Lane, to be parking for trail and property use, and for overflow municipal parking across the street;

Prune or clear vegetation which obstructs views into property along Wellesley Street and Ash Street, where shown on plan;

Preserve existing ornamental trees on south side of Wellesley Street;

Prune or clear yew hedge at old teaching garden to promote view into north parcel from Wellesley Street;

Consider removal of arborvitae hedge along Wellesley Street.

**Map #4. Land Use Alternatives**

In the event that the Town is not able to preserve the entire property, this plan identifies which parcels of the site are the most important to preserve, and which could best support an alternative land use with the least impact to the overall character of the property.

The areas on the site with the highest priority for preservation are those most critical to the overall character of the site. They are those open fields, mature trees, historic houses, stone walls, and trails which fall within the Historic Hillcrest Corridor on both the north and south parcels. These are the areas which can most easily be seen from Wellesley Street, Newton Street and the Ash Street. These are the areas shown on the plan to be preserved.

The areas on the site called out on the plan as Land Subject to Change are those which could support an alternative land use with least impact to the overall character of the property. These areas are not as easily seen from the abutting roads, either due to screening by existing trees or being more distant from the roads themselves. These areas are located along the edges of the Historic Hillcrest Corridor, not in the middle of it. The four areas identified on the plan as Land Subject to Change include:

**Pine Woods** - This area, approximately 14.5 acres in size, is located on the north parcel along its northern edge and is covered with trees. It would retain a 250-foot deep buffer of trees to separate this area from the open field to the south to block the view of development in this area from Wellesley Street. Steep topography along the northwest slopes of this area will serve as a constraint to development here.
Access to this area is proposed to be from Wellesley Street along the trees at the eastern edge of the open fields. This point was selected because it is the shortest distance and easiest gradient for access to the Pine Woods area, and it provides a nice view of the open fields.

South Meadow – This area, approximately 10.4 acres in size, is located at the southernmost part of the property on the south parcel adjacent to Ash Street. This area is the lowest part of the site, which cannot be seen from Wellesley Street or Newton Street. There are some trees along the perimeter of this area, as well as some within the area itself, which will help screen views of this area from the rest of the property or Ash Street. This area is gently sloped toward the wetland along the south edge of the property. Development constraints here include the 100-foot wetland buffer, and some low spots within the site itself. Access to this area would be from Ash Street.

Northeast ANR lot – This is a legal Approval Not Required lot, approximately 60,000 square feet in size, located on the northern side of Wellesley street at the eastern edge of the property. Because this lot is adjacent to an existing house, is located furthest from the Historic Hillcrest Corridor, and cannot be easily seen from the Corridor, it should not significantly impact the character of the rest of the property if it were developed as a house lot.

Southwest ANR lot – This is a legal Approval Not Required lot, 60,000 square feet in size, located on the southwest edge of the north parcel along Wellesley Street. For the same reasons as noted above for the NE ANR lot, this lot could be developed as a house lot without significantly affecting the character of the rest of the property. There are constraints to developing this site which include steep topography and closeness to an adjacent wetland.

In summary, the major elements of this plan include:

**Preserve**
- Historic Hillcrest Corridor, including the major swath of open fields connecting the north and south parcels;
- Major stand of trees at “nose”, rhododendron area;
- Critical vegetated buffer of mature trees 250 ft deep along south edge of Pine Woods;
- All three historic buildings, considering adaptive reuse;
- Major trail connections;
- Major views into and out of site;
- Major stone walls, chimney.

**Improve:**
- Parking area (as described above)
- Prune / clear vegetation (as described above)
Land subject to change: Pine Woods
South Meadow
NE ANR Lot
SW ANR Lot

Map #5. Land Use Development

This plan was developed to show what residential development could occur on the four areas of Land Subject to Change identified on Plan 3. This plan shows the residential development that could occur which meets the requirements of the Town of Weston’s Zoning By-Laws for the Residence A Zoning District and the Subdivision Regulations. This is not a recommended plan, but an accommodation study only. Among other requirements, the lots have a minimum of 60,000 square feet, 250 feet of street frontage, and the subdivision roads have a 50-foot wide right-of-way.

The following is the number of possible lots per area as shown on the plan:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Pine Woods</td>
<td>8 lots</td>
</tr>
<tr>
<td>South Meadow</td>
<td>5 lots</td>
</tr>
<tr>
<td>ANR lots</td>
<td>2 lots</td>
</tr>
</tbody>
</table>

Conclusion

Given the project goals and planning process followed, these four plans represent CRJA’s analysis and recommendations for the Case Estates Land Use Plan. These plans were shared and reviewed with the CERC, and subsequently revised as shown per the Committee’s input. Further follow-up survey work and planning will need to be done to refine these plans.
VI. Funding Recommendations and Considerations

A. Maintaining Control of the Case Estates Land: Funding Sources

Harvard has informed the Town of Weston of its intent to sell the Case Estates at a market price and has offered the Town an opportunity to have a “first look” before the land is offered for sale to developers. The Case Committee’s expectation is that Harvard plans to sell the land as a single parcel. This implies that the Town must find a way to fund the entire purchase price if it is to control how the Case Estates Land will be used, and to preserve some or all of it as open space, gardens, and woodlands.

Harvard has proposed a price of $27 million for the Case Estates and has indicated a desire to close on a sale late this year. Although there is considerable uncertainty about the value of the land in the current real estate market, the Case Committee expects that the acquisition cost of the land will exceed any single source of funding. With this in mind, we have considered four principal sources of funds that might be available for this purpose:

1) Community Preservation Act Funding which is derived from a 3% annual surcharge on the real estate taxes collected in Weston (and is currently matched with State funding), as explained further below.

2) Private donations, covered in another section of this report. It may also be possible to obtain grants from private or public foundations, and this is still being investigated, but we believe it unlikely that Weston can receive much help from this source.

3) Funding from the Town for acquisition of land for municipal purposes acquisitions or for resale for development, once the Town residents’ preferences for funding the acquisition of additional conservation or municipal purposes land is better understood. This could be funded by short-term borrowing by the Town until a specific plan is developed. This would provide the opportunity to further develop, communicate, and discuss with a broad audience the many alternative uses that have been proposed for the use of this land, ranging from total conservation to partial town ownership and/or sale for private development.

4) Revenue gained from the sale of portions of the property for development. The Case Committee has viewed offering portions of the land for private development as a last resort. We should point out that under the current Residential A Zoning restrictions on the land, previous studies have indicated that the two parcels could perhaps accommodate several “Approval Not Required” (ANR) lots and additional lots developed through the subdivision process which must receive approval from the Planning Board, for a total of approximately 29 lots.

If the town is unable to fund the full acquisition price through some combination of the first three sources described above, it implies that the Town will need to coordinate the land acquisition with a developer. This creates a more complicated transaction and lowers the probability of being able to control the outcome of the sale. It also provides limited time, given Harvard’s proposed schedule, for defining specifically (and discussing with Town residents) which parcels of the Case Estates will be sold and how the Town may influence the development of these parcels. In view of these complexities, it is very unlikely that this source of financing could be completed in advance of the Fall 2006 deadline.
for presenting an offer to Harvard. It is a financing option that could later be pursued if short-term municipal bonds were to be issued to guarantee control of the Case Estates.

B. Community Preservation Act Funds

The Weston Community Preservation Committee (CPC) administers the funds collected under the state Community Preservation Act (CPA) legislation. The 3% surcharge on the real estate tax revenues the Town voted to impose five years ago currently generates about $1.3 million per year, as shown later in a table. The State has so far matched the amount cities and towns collect with an equivalent State contribution, but that is subject to change prospectively. The amount of the State match will be influenced by the total amount available from the State for this purpose and by the number of cities and towns that vote to participate in this plan. The principal spending restrictions on the Town CPA funds and the State matching funds are that at least 10% has to be allocated to each of open space, historic preservation, and community housing purposes, with whatever remaining funds are held in a general reserve. Anything not spent in any category can be held over for future years.

CPA funds cannot be used to acquire or support activities for which the Town is normally responsible, such as schools, firehouses, etc. CPA funds expended need to be allocated to specific parcels or buildings based on appraisals and must be bound by permanent deed restrictions consistent with the purpose of the acquisition. Once land or property is acquired with CPA funds for a specific purpose, it takes an act of the State Legislature to change that designation. Therefore neither the Town nor anyone else can buy property acquired with CPA funds. Neither can CPA funds be used to buy land from the Town.

CPA funds could be used to service a Municipal Bond that would allow the Town to borrow against future CPA revenue to fund open space preservation, historic preservation, or affordable housing on the Case Estates land. The CPA Act stipulates that only CPA funds that are collected by the Town from the local surcharge are available to fund a bond offering. A bond offering would be a general obligation of the town.

The table below shows estimates of what the local surcharge is likely to be for the next four years, what the already committed charges are for previous bonding for the Sunday Woods conservation land acquisition and the Brook School Apartments, and the net amount from this surcharge that would be available to support portions of a bond offering by the Town. The Sunday Woods assessments end in 2008, but the Brook School charges go on for ten more years at about the same level.

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estimated Surcharge</td>
<td>1.3</td>
<td>1.4</td>
<td>1.4</td>
<td>1.5</td>
</tr>
<tr>
<td>Sunday Woods</td>
<td>0.3</td>
<td>0.3</td>
<td>0.3</td>
<td>0.0</td>
</tr>
<tr>
<td>Brook School</td>
<td>0.5</td>
<td>0.4</td>
<td>0.4</td>
<td>0.3</td>
</tr>
<tr>
<td>Net Available</td>
<td>0.5</td>
<td>0.7</td>
<td>0.7</td>
<td>1.2</td>
</tr>
</tbody>
</table>

The above table reflects only the local surcharge available to the CPC and their current outstanding commitments. The State match is also available to the CPC for any purpose other than bonding, as is the current CPC reserve account of a little over $5 million. The town portion of the CPA revenue has an
upward trend, since it is tied to the town's general expenditures, which inherently grow because of commitments for employee salary and benefit costs, even if discretionary expenditures are maintained at existing levels.

The CPC will have to determine the amount of commitment in CPA funds it will recommend to Town Meeting to support the acquisition of the Case Land in view of the other present and foreseeable claims on the CPA fund. There are other existing proposals for the use of CPA funding, such as the restoration and reuse of the Josiah Smith Tavern, and there could potentially be other large land conservation opportunities in the future. The recommendations of the CPC for providing funding for the Case Estates will have to be voted on at town meeting.

The CPC has not yet made a recommendation of funding for the Case Estates preservation, but we can estimate a range of CPA funding based on the expected revenue from the tax surcharge. If $1 million were committed to the first annual payment for a 20 year bond, at current interest rates of about 4.5% the town could borrow about $11 million. If the commitment is half of that, the amount borrowed would also be half. A shorter term bond would support less borrowing, and higher interest rates would also support less borrowing.

Under municipal accounting standards the annual payment declines slowly over time. If the CPC were to commit an initial $1 million annually to fund a bond, there would be a shortfall in yearly CPA funds available to fund all of the existing obligations plus the new offering of several hundred thousand dollars for three or four years, as only about $0.7 million is available for each of those years. The shortfall would disappear in about 2009 as the annual payments gradually decrease and the annual revenue from the real estate tax surcharge gradually increases. It may be possible that the shortfall in those earlier years could be covered by placing some of the $5 million the CPC now holds in a general reserve into an escrow account.

The above is meant to be illustrative of the financial situation with regard to CPA funds, using rounded numbers and estimates. The committee has not yet sought specific advice from legal or financial advisors. More precise estimates can be made using the Town Finances Excel Spreadsheet.

C. Town Funds

In view of the current asking price of $27 million from Harvard, it is apparent that even under the most favorable conditions there is likely to be a considerable gap in funding between the asking price and the funding likely to be available from the CPA and private donations. Efforts to obtain private donations are under way and described elsewhere in this report. If the Town is to meet Harvard’s proposed timing for a transaction, decisions will need to be made at the Fall 2006 town meeting on an agreement to purchase the land from Harvard and on specific funding proposals. Even if the Town residents prefer to only preserve a portion of the Case Estates, with the remainder sold for development it will be a complicated transaction to coordinate a joint purchase with a developer if the Town wishes to be sure of retaining control. By buying a portion of the land with town funds for Municipal purposes or potential resale, the Town will have greater control of the transaction, and more time to consider the long term use of a large piece of property abutting other town facilities. It will also, however, bear the financial risk of funding a significant land acquisition in an uncertain real estate market. This is less of an issue.
for land purchased for future municipal purposes, but will be in important consideration if there is a
decision to resell part of the property.

One way in which this could be done would be for the Town to issue a short-term bond to acquire land
not acquired with CPA funds or acquired for conservation with private donations. The bond term could
be two years, which should give the town sufficient time to develop specific alternatives and discuss
with the town residents the uses of various portions, including the revenue that could be raised by
selling portions for limited development. This would also provide more time for soliciting private
donations, perhaps with regard to specific parcels. It would ultimately be up to the Town to decide at a
town meeting how much of the land they want to preserve essentially as is, and what portions, if any,
they would prefer to see developed in order to reduce the amount requiring financing by the Town. It
would also give the Town the option to retain portions for Town purposes if desired, which would be
refinanced with a longer term bond. The long-term exposure of the town with regard to such a short-
term financing arrangement is that any portion of the short-term bond not recovered by land sales or
donations would also become a long-term obligation of the town.

D. Land Valuation

If the town is going to acquire a part of the land for municipal purposes with funds raised from a tax
levy (potentially to be sold for development later), this implies that a specific part of the Case Estates
needs to be designated for this purpose and that it will have a defined price as a part of the transaction.
Similarly, any private contributions tied to preservation of specific parts of the Estates will need to be
assigned a value in the transaction. Our recommendations outline preservation priorities and describe
the parts of the Estates that we expect will be acquired with the various blocks of funding. The CPC
has not yet received specific appraisals for the value of each block of land.
VII. Recommended Guiding Principles for Management

We recognize that acquisition of any property for the town requires thoughtful consideration of management.

The legacy of Miss Case provides an inspiration in thinking about land management. Above all she was a good steward of the land. Our land planner who has worked for 50 years in the profession reflected the importance of this value when she first met with the Case Estates Review Committee and admonished us that above all, "You must be good stewards of the land you acquire".

The next legacy of Miss Case was her adaptability to change. She was a visionary who was constantly experimenting with new ways to use her land. Hillcrest was an evolving commitment first to farming, then to gardens and the collection of horticultural specimens from around the world. When she gave her land to the Arboretum this evolution of the landscape continued as the Case Estates was used as an educational facility and a place for display gardens including the Rhododendron garden. Presently the 60 acre parcel is open to the public for passive recreation and enjoyment of a naturalistic landscape that represents something between a wild wood and a casual park. Through the years, the land has always welcomed the community, young and old.

Stewardship and flexibility for change are two of the hallmarks of the legacy we inherit at the Case Estates. Within these values several guiding principles come to mind.

A) Principles

1. Maintain the site in a way that is compatible with the existing neighborhood.

2. Creation of a management plan that provides the most healthy, safe, passive recreational opportunities for people while there is protection of the wildlife habitat and the environment. In a management plan for this particular property it is especially important to consider its proximity to community resources, especially the schools. There are a wealth of opportunities for collaborative efforts in educational endeavors.

3. Insure the site blends in with the historic district and associated conservation land. Restoration of the site, if necessary, should be accomplished in such a way that it is in keeping with the character of the scenic roads and historic buildings that surround the site.

4. Retain the option to maintain parts of the site as areas of natural open space.

5. Retain the option to maintain parts of the site for uses that contribute to the education of children and adults.

6. Retain the option to maintain parts of the site for agricultural and other horticultural purposes
7. Maintain the buildings and land in such a way that they are not only appropriate for present and future use but also such that they do not contribute an undue financial burden for the town.

B) Some data on present management costs.

Responsible management also considers the cost of the proposed land use. Since our recommendation is focused on immediate custody and control without specific recommendations to future use, we have gathered figures relating to the level of maintenance applicable to the present use of the site for passive recreation and open space. When the next committee considers the future use, costs will always be an important factor.

Present use, passive recreation, open space, reflects the level of use for most of our conservation land in Weston.

To mow the land twice per year and maintain the trails should cost about $3,000 per year, certainly no more than $5,000. This is an estimate for Case from the Conservation Commission which is the town committee that maintains all the conservation land in Weston with the support of Weston Forest and Trail and the help of Land’s Sake.

Harvard presently spends more than this. Their level of maintenance includes Land Sake’s mowing of the fields for about $1,000 plus using a commercial landscaper for cutting grass, plowing driveways and tree work around the buildings. Another cost is maintenance of the display garden behind the schoolhouse ($10,000).

This comparison is illustrative of the way maintenance cost will be dependent on the use of the property and who does the work.

C) Management Structure: Board of Selectmen in charge of the property

The Weston Board of Selectmen should be in charge of the property. To accomplish the management principals noted above the Selectmen have the confidence and trust of the community. The Selectmen, which are the elected officials of the Town, can review the use of the property and its management on a yearly basis to evaluate management practices. Since they are elected officials, they can also respond to change.

Their oversight will provide continuity of good management practices for the present and yet allow for change if a new committee makes new recommendations. They in turn can delegate the day to day management of the site to another group that they feel will ensure that the guiding principles are adhered to. Since this property is being acquired for future years (hundreds), its use may change and the appointed entity to manage the property may change from time to time depending on performance standards and the existing goals of the community. But the most basic
fact of New England town government is that we know that the most stable long lasting and democratic body within a town is the Board of Selectmen and thus management responsibility for such a valuable resource should rest in their hands unless otherwise delegated.

If the land is subsequently acquired for school use, cemetery or park use, or conservation (Article 97) use, then the other appropriate boards or departments in Town would be responsible for maintenance.

Management Summary: For now, the Board of Selectmen should manage the Case Estates land to promote good stewardship of the land and provide an opportunity for change in use depending on the vision of the times. Consideration of guiding principles, stewardship as well as costs should be taken into account when decisions are made on land use.
VIII. Closing

This report was given to the Board of Selectmen, as requested, before May, 2006. The committee hopes to have a public hearing to allow for more public discussion and input. Through their continued efforts, the Selectmen will be collecting more data that will have bearing on their recommendations at Fall Town Meeting. The Weston Town website. www.weston.org will continue to have information about the latest news regarding the Case Estates.
APPENDICES
Appendix 1 – Committee Charge and composition

CASE ESTATES REVIEW COMMITTEE CHARGE

1) As its first priority, review and make recommendations regarding the potential acquisition and future use and funding for some or all of the Case Estate property for municipal purposes including:

   a. General town needs;
   b. School Department needs;
   c. Cemetery needs; or
   d. Recreational needs.

Resources for this review include Alan Oliff, Superintendent of Schools, Acting Town Manager, Donna VanderClock, Bill O’Neil, DPW – Parks and Cemeteries, and Doug MacDougall, Recreation Department Director.

2) Secondly, review and make recommendations regarding the potential acquisition, future use and funding for some of the Case Estates property for:

   a. open space,
   b. historic preservation, and/or
   c. affordable housing uses.

Resources for this review should include the Housing Needs Committee, the Historical Commission, the Weston Forest and Trail Association, and Land’s Sake. The Community Preservation Committee should be consulted in this segment of the review for both potential uses and funding.

3) Finally, review and make recommendations as to how the land not required under 1) or 2) above, should be privately developed with uses, and, possibly, restrictions, that serve the long-term interests of the town. This could include ownership by non-profit organizations who might acquire land or easements with privately-raised funds.

4) The committee should consider the short and long-term financial impacts of their recommendations, including both capital and on-going maintenance costs to be borne by the town.

5) The committee is encouraged to hold periodic, widely-publicized meetings to solicit input from residents and town organizations, and to review their findings.

6) The committee is encouraged to investigate funding sources both public and private for the municipal and non-municipal uses of the land.
**Budget**

1) In its analysis of the property, the Case Estates Review Committee shall have authority to expend for consultants and related costs up to $50,000 of our town’s CPA funds, as authorized at Weston’s 2005 Annual Town Meeting.

**Timetable**

1) The committee will periodically solicit input from and report its progress to the Board of Selectmen.
2) The committee is expected to make its recommendation in time for action to be taken at Weston’s 2006 Annual Town Meeting.

**Committee Members and Resources**

1) The Committee is to be comprised of the following members: *(See complete list of voting and non-voting members on website)*

   Kay McCahan – Chair
   Dusty Reeder
   Norman Berg
   William Gallagher
   William Stevenson
   Elizabeth Ericson
   Winky Merrill

2) Supporting the committee, as non-voting members, will be an individual appointed by each of the following boards:

   The Planning Board
   The Conservation Commission
   The Housing Needs Committee
   The Historical Commission

   Non-profit organizations in town, including the Weston Forest and Trail Association, Land’s Sake, and Weston Land Trust will be encouraged to appoint individuals who will represent their organization’s interest during the committee’s review process.

3) The Town Planner, Susan Haber, will provide general advice and support.

4) Harold Hestnes, former Selectman, has agreed to be a special consultant to the committee, and has been appointed by the Board of Selectmen as such, especially for the purposes of facilitating communication with the Arnold Arboretum and Harvard University.
Appendix 2 – Future Town Municipal Needs

STUDY OF WESTON’S FUTURE MUNICIPAL NEEDS

The charge to the Case Estates Review Committee tasked the group to review and make recommendations regarding potential acquisition and future use of the Case property for municipal purposes. Resources for this review included Alan Oliff, Superintendent of Schools, Acting Town Manager, Donna VanderClock, Bill O’Neil, DPW - Parks and Cemeteries, and Doug MacDougall, Recreation Department Director.

Reports, Findings and Recommendations

The Case Estates Review Committee has spent the Fall of 2005 talking to Town Department Heads and Community organizations in an attempt to identify potential future municipal needs for the Case Estates property. Most of the information from these interviews and presentations is recorded in the committee minutes from September 2005 which are available on the town web site at www.weston.org under "committee minutes and agendas." Below is an updated summary of this work since there has been subsequent discussion on some of the issues.

A. General Town Needs

Interviews: Zibby Ericson interviewed Donna VanderClock, Acting Town Administrator.

Case Campus

Case Campus is the name given to the area directly adjacent to the Case Estates across Alphabet Lane. The area contains the Community Center (Recreation Department and Council on Aging), the School Administration Building (Case House), an elementary School (Field School) and the Town Library as well as access driveways, parking areas, playing fields and septic systems. Over the years as more town activities clustered in this area there have been issues of parking, vehicular access, traffic as well as concern about the compromised rural viewscape along School Street. A Case Campus committee was formed representing all constituents of the area and this group has worked with the town engineer, the town manager and others to devise plans to solve some of the issues. The CERC learned of some of the issues as interviews were conducted with various town department heads and the town manager.

Relationship with Case Campus -
Bill Stevenson also interviewed Steve Fogg, Town Engineer on this subject. Susan Haber, Weston’s Town Planner, attended CERC meetings and could speak to this issue. As noted below a special site walk took place to examine the Case Campus issues as well as School concerns (see further information in the school section).
Findings:

- It was agreed Case Estates planning effort should be aware of both traffic and parking issues related to the Case Campus area.
- Parking is especially an issue for the Council on Aging since the lower lot near their entrance is often full requiring seniors to walk long distances.

Recommendation:
The plan for the future use of the Case Estates should include a parking area that could be used for the COA as well as for visitors to the Case property. The area located off Alphabet Lane seems ideal for both purposes.

B. School Department needs
Interviews: Norm Berg interviewed Alan Oliff, Superintendent of Schools
Site Walk: Norm Berg, Alan Oliff, Susan Haber, Donna VanderClock and Kay McCahan to see the situation around Woodland School related to the emergency exit issue. Parking issues and curriculum opportunities on the site were a continuing theme of all discussion.
Dr. Patricia Jacobs, Elementary School Science and Social Studies Specialist sent a description of present curriculum opportunities entitled, “The Case Estates: Uses for Elementary Science and Social Studies”. This is included at the end of this section.

Findings:

- An issue was raised about secondary emergency exit from Woodland School. The Weston Schools will explore the possibility of exiting out of the back of Woodland School into the paved playground area and into the cemetery road system. This is in a wetlands and floodplain area. The implications of an exit in a wetland resource area need to be researched through a filing with the Conservation Commission and others. The Park and Cemetery Department should also be notified of this potential exit through the cemetery property so they leave an easement clear and do not begin using the ground for cemetery plots.

- Parking issues - Case Estates should provide adequate parking for its own uses without exacerbating parking problems in the area. If Case can provide extra parking for special events, that would be desirable.

- Educational Opportunities - Case property has been used for classroom opportunities in the past and would certainly be used in the future. A statement from the schools notes:

  "All three elementary schools use the Case Estates land for a variety of science and social studies activities. We value our local resources and recognize the importance of education in a natural setting. To this end, we integrate the natural world as much as possible with the elementary curriculum". (See "The Case Estates: Uses for Elementary Science and Social Studies" below).
Summary of Findings
There is no pressing school need for the Case Estates site at this time. In fifty years when schools need to be renovated or rebuilt, a piece of municipal purpose land in the vicinity of the elementary schools might prove to be very useful. At present, it is a unique opportunity to have the Case Estates as an adjacent area such that the natural world can be integrated with the elementary curriculum.

Recommendations
The School Department should follow-up on the emergency exit issue if they feel this is important

The Case Estates: Uses for Elementary Science and Social Studies

The following summary was written by Patricia Jacobs, Elementary School Science and Social Studies Specialist.

The Case Estates
Uses for Elementary Science and Social Studies

All three elementary schools use the Case Estates land for a variety of science and social studies activities. We value our local resources and recognize the importance of education in a natural setting. To this end, we integrate the natural world as much as possible with the elementary curriculum.

Beginning in Kindergarten, students are introduced to the outdoors through a study of the changes in the seasons and taught to observe and record these changes. They use the local stream to gather natural pond water for their tadpole tanks, and use the forest to gather in a quiet place and learn to sharpen their senses by noticing the details of nature. Mapping is an important Kindergarten skill for learning social studies. Students are first introduced to their “sense of place” by taking guided walks and drawing and labeling their observations of a particular space.

First Grade students are engaged in a study of trees through the seasons and the birds that live in them. Each class “adopts” a tree and records the seasonal changes, building on their Kindergarten experience. Gathering leaves and twigs for close study and comparison enhances the unit and adds to the quality of the students’ science notebooks, our benchmark assessment for this grade. Students also record bird sightings as they study the structure and function of these animals. In addition, first graders learn about different types of soil and their properties. Use of the Case Estates enables us to extend these units of study beyond the schoolyard.

Second Grade students use the local land for nature walks as they study the life cycle of plants. Comparison of plants grown in the classroom and from nature is key to a student’s understanding of the structure and function of a variety of plants. Having an open space to observe cloud formations and record temperatures also enhances the weather unit. Second grade teachers have made a serious commitment to these units of study and depend on the availability of this land to enrich the curriculum.
Third Grade students study insects and habitats. This unit requires that different habitats be explored and compared. One of these activities requires students to rope off a “micro-habitat” and observe and record specific changes over time. In order to provide a variety of these “micro-habitats”, the use of the Case Estates property is important. It provides a greater choice of sites for our classes. Grade three social studies units include a study of the town of Weston. The Case Estates figure prominently in that study.

Grade Four students take an annual “Rock Walk” around the estates to study rock formations, outcroppings and buildings made from a variety of rocks and minerals. This type of exploration allows us to build on the previous year’s experiences by extending the thinking and at the same time, developing an appreciation for this local treasure.

Grade Five continues this natural exploration by taking forest walks (organized and conducted by Land’s Sake staff) on the property while studying ecosystems in science. The social studies curriculum includes reenacting the trials of the pioneers on the Oregon Trail. Taking a wagon ride through the forest and the fields simulates this. Students have had training in the past on keeping a nature journal. This integrated activity included the participation of an art teacher as well as an outside author. Students created beautifully written and illustrated journals. This would not have been possible without the use of the Case Estates.

For the future, the schools have explored the possibility of creating formal nature trails and an outdoor laboratory, as a community-based project. We use the land extensively and would like to continue making good use of it for our students, while in school or with their families.

**C. Park and Cemetery**

Kay McCahan was assigned to work with Bill O’Neil, DPW, Park and Cemeteries. They had several conversations throughout the fall and winter on the subject of cemetery use.

**Findings**

Bill submitted a report to the Case Estates Review Committee and the Selectmen in August 2005. Its subject was "Considerations for the Acquisition of Future Cemetery Land in Weston. In a section "Planning for the Future" Bill concluded:

“The one major question, and purpose of this report, is "What next?"
Linwood Cemetery has a finite life. There will come a time in the near future when the Town will have to choose between discontinuing the practice of providing burial space for residents within its borders, or acquiring and developing additional land for cemetery space.

Under the current lot sale practices, we sell on average 40 individual burial spaces per year. Assuming that one acre of land will accommodate up to 500 individual burials, this places our projected sell-out point at about 60 years. This would suggest that in 50 years, the Town should be prepared to begin the design and development stage for a new cemetery. With parcels of land suitable in both geology and acreage rapidly disappearing, it would seem prudent to give serious consideration to setting aside land for this purpose."
sooner, rather than later. Such an area could be utilized as public open space in the interim; a park-like setting for the enjoyment of nature, walking, and other passive recreational activities. Then, when the time comes, it could be transformed into a cemetery of equal beauty and serenity.” (Report from the Park and Cemetery Department, August 2005 is attached as Appendix 3).

CERC began explorations of the use of the Case land for cemetery. In March Bill O'Neil, Kay McCahan and Dusty Reeder met with Bill Clendaniel, President of Mount Auburn Cemetery. It became apparent that the type of land that Weston needed was for casket burials. There is more than enough room at Linwood for cremation areas and in fact there is already a co-mingling garden on the site.

Bill sent a subsequent recommendation to the committee saying:

“Ideally, a new cemetery would be constructed as close as possible to the existing one for ease of operation…one recommendation would be to set aside a portion of the Case Estates as municipal purpose land, for whatever application, but leaving the possibility for conversion to cemetery use at some point in time. He also noted the land currently occupied by the Woodland School, which abuts Linwood Cemetery, should also be taken into consideration. In fifty years time this structure might need to be rebuilt, and could be relocated to another site leaving room for the cemetery to expand naturally. (See report dated March 1, 2006 from William O'Neil in Appendix 3)

Recommendations

It would be good planning to set aside some municipal purpose land on the Case Estates site, in the event it is needed for future cemetery use.

The Northern Hillside Pine Woods area is a perfect area for future Municipal Purpose land because of its central location within the part of town that contains so many community uses. This land could provide additional flexibility in the future as the Town struggles with emerging town needs at a time of disappearing open space. As noted earlier, the Case land is probably one of the last times the town will have the opportunity to consider land acquisition on a large scale. The Selectmen and the community should ponder this unique opportunity in the context of a 50-100 year time frame.

(Note: The original cemetery report and the subsequent recommendation are important documents to be retained for a future study on cemetery needs.)

D. Recreation needs

Winky Merrill interviewed Doug MacDougall, Recreation Department Director. Kay McCahan talked to Bob Crowley, Head of the Weston Field Study Committee.
Findings

Weston needs additional playing fields. The Weston Field Study Committee that is embarked on a 10-year master plan has concluded that there are better options for playing fields in other areas of the community. The main thrust of the playing field initiative is to refurbish existing fields in existing locations.

(A study of playing fields study, "Athletic Field Master Plan April 2005" can be obtained in the CPC office. The subsequent master plan developed by the community is available through Bob Crowley, Chair of the Weston Field Study Committee or Doug MacDougall, Weston Recreation Director).

Recommendations. There is no need to consider playing field construction on the Case Estates.

E. General Municipal Purpose Needs:

Findings

• Municipal purpose use is of great importance to the Selectmen.
• Any help the CERC planning effort can make to further solutions to future municipal needs is of the highest priority.
• The planning efforts on the specific property should be in the context of the adjacent area (Case Campus and immediate neighborhood); the nearby neighborhood (Regis College) and indeed the entire town. The Town of Weston has no current master plan but considerations that are inherent in such a planning process should be taken into account. e.g. a broad perspective not a narrow one.
• Along the same line, it has emerged in discussions that when looking at future town needs all municipal purpose land should be taken into consideration - not just the Case land. For example, Weston will always have affordable housing needs but solutions should be in the context of all town land as well as a review of the whole town system of meeting housing needs rather than planning on an ad hoc basis. The Selectmen and the Planning Board are beginning to work on a master plan to approach this issue. This seems an organized, rational way to proceed on such an important issue rather than to look to one piece of land or one opportunity to solve such a systemic problem.
• Financial considerations are important to the Selectmen
• Housing needs are important to the Selectmen

E. Funding Issues:

Funding for municipal purpose land has to come out of the Town budget. Cemetery land can be funded by Community Preservation Funds but the land set aside for this purpose needs to be deeded within a year. This means though the land could be
used for open space, trails and passive recreation until needed for cemetery use, it could never be converted to school use or housing.
History of Cemeteries in Weston

Farmers’ Burial Ground:

This historic burial ground antedates the Town’s incorporation in 1713 by ten years. It derives its name from the fact that until then, what now is known as Weston was known as “The Farmers’ precinct of Watertown”.

First burial of record – Ensign John Warren, 38, July 11, 1703. In it rests the remains of some of the community’s earliest and most prominent citizens, including Josiah Smith and Col. Lamson.

On November 1, 1839, Amos Harrington conveyed “To the Town of Weston all my rights and title to the old burying ground situate nearly opposite the dwelling of Isaac Brackett (what is now Soldiers Park) to be used as a burying place forever.”

Artists from all over the country have come here to trace epitaphs that adorn many gravestones and to sketch the artistry that characterizes the design of the hand-cut monuments.

South Burying Ground:

This sacred half-acre piece of land, still surrounded by its original stone wall, is located on South Avenue, and was conveyed to the Town of Weston in 1790 by Increase Leadbetter. “And to accommodate the south part of the town, Mr. Increase Leadbetter, being in Town-Meeting, did agree to sell half an acre of his field adjoining the road, to the Town to make one division wall said to be about ten rods, and pay him five dollars as a consideration for the same – which was likewise agreed to by the Town.”

Although no records prior to that time have been located, it is well known that this plot had long before been used for burials by residents of the south section of the Town. In those olden days it was called the “Leadbetter Cemetery.”

Central Cemetery:

First burial of record – Deacon Thomas Russell, 73, May 7, 1792. This is Weston’s third oldest cemetery, embracing 2 and one-half acres. On January 1st, 1790, Isaac Jones had conveyed to the Town one and one-half acres of land on the south side of “The Great Country Road” as a “burying place forever.” Additional lands were conveyed May 13, 1834 by Stephen A. and Isaac H. Jones, and October 11, 1892 by Isaac Fiske whose law office still stands on the northeast corner.

At least 25 veterans of the Revolutionary War are buried here.

Central Cemetery is for all intensive purposes, inactive. However, in the past fifteen years, we have performed two casket burials, and the committal of several cremation urns. While these occasions
are rare, and their likelihood lessens with each passing year, we still need to be prepared for such an event.

**Linwood Cemetery:**

Linwood Cemetery has been the principal burial ground in Weston from 1873 until present. The original parcel consisted of nine acres, purchased on August 5, 1873 from Marshall Hews for the sum of $2,250. This land was conveyed “For use as a cemetery, and no other.” A new road(now Linwood Avenue) was constructed to connect the new cemetery to Central Cemetery(the Route 20 by-pass did not exist at this time). In August, 1904, the Town took 8.91 acres of land just to the south from Caroline, Frank, and Charles Hews for payment of $2,000. Subsequent expansion through acquisitions of adjoining parcels in 1948 and 1951 brought the total area to fifty acres.

First burial of record – Alonzo F. Benson, 41, July 15, 1874; Pastor of the First Baptist Church, whose inscription reads “The First Tenant of Linwood Cemetery”.

**Present Day**

Linwood Cemetery sits on a 50 acre parcel of land owned and operated by the Weston Park and Cemetery Department. Of this, approximately 35 acres is developed and in use for current and future burial space. The majority of the remaining area falls under the Wetlands Protection Act, and is unavailable for use.

There is a distinct difference between the length of time a cemetery will reach a saturation point with no room for burials, and when the cemetery no longer has plots available for residents. Interments will continue in Linwood for up to 100 years, but the available plots will be “sold out” in a much shorter time frame.

Currently, there are approximately 5 acres of developed land suitable for lot sales; beyond that, Linwood Cemetery has reached the limit of available land for interments.

**Current Practices**

In order to pre-purchase burial rights in Weston, one must be a current Weston resident or past/present Town employee and be 65 years of age or older. Lots are available on an immediate need basis for residents who suffer a sudden death in the family. These arrangements are made regardless of age.

This method of selling lots accomplishes three goals: 1) Allows senior citizens to plan ahead, thus not placing an undue burden on their families. 2) Ensures that there is adequate space available for residents in their time of need. 3) Helps to prolong the life of the cemetery by not pre-selling plots to people who may not use them for 40 years.

Managing lot sales in this manner seems to have reached an equitable balance between meeting the needs of the residents and ensuring the maximum sustainable life of the cemetery.
**Cultural Practices**

People are choosing cremation for themselves and loved ones with more frequency in recent years. The national average for cremation in 2002 was 27%, while in Massachusetts the cremation rate was 25%. These figures are expected to rise steadily; by 2010 projections indicate that cremation will account for 35% of all burials, and 43% by 2025.

From 1999 through 2004, Linwood Cemetery has had an average cremation rate of 42%. This does not necessarily mean that Weston on the whole has a 42% cremation rate related to all deaths. Burials in Linwood account for approximately only 50% of recorded deaths in town. Statistics regarding the disposition of the remaining deaths were not available at the time of this report.

Many faiths that once took a hard line antipathy to cremation have loosened these old views in recent years. Roman Catholics, who forbade cremation until as recently as 1969, now have a cremation rate higher than the national average. The Catechism of the Catholic Church now states that “cremation is permitted so long as it is not chosen as a denial of faith in the resurrection of the body.”

Religions and individuals alike are coming to terms with the practicality and seemingly unstoppable popularity of cremation. One of the main reasons behind this is cost; a cremation interment can be arranged for a fraction of what a casket burial would run. Other factors are environmental, convenience, and preference.

**Planning for the Future**

The one major question, and purpose of this report, is “What next?” Linwood Cemetery has a finite life. There will come a time in the near future when the Town will have to choose between discontinuing the practice of providing burial space for residents within its borders, or acquiring and developing additional land for cemetery space.

How much time do we have?

Under the current lot sale practices, we sell on average 40 individual burial spaces per year. Assuming that one acre of land will accommodate up to 500 individual burials, this places our projected sell-out point at about 60 years. This would suggest that in 50 years, the Town should be prepared to begin the design and development stage for a new cemetery.

The expected increase in the cremation rate can certainly help to extend the life of the existing cemetery; cremation lots are somewhat smaller and can accommodate more burials than traditional sites. However, this does not eliminate the need to plan ahead for a future cemetery. Regardless of whether Linwood has lots available for 60 years or 75 years, the end result is still the same; at some point in the not so distant future we will need a new burial ground.
With parcels of land suitable in both geology and acreage rapidly disappearing, it would seem prudent to give serious consideration to setting aside land for this purpose sooner, rather than later.

Such an area could be utilized as public open space in the interim; a park-like setting for the enjoyment of nature, walking, and other passive recreational activities. Then, when the times comes, it could be transformed into a cemetery of equal beauty and serenity.

**Location, Location, Location**

The possibility to expand the existing cemetery to adjoining parcels does not appear to be an option at this time. Linwood is bordered by wetlands to the south and east, Police and Highway Departments on the west, and Route 20 to the north.

Ideally, a new cemetery should be located as close as possible to the existing grounds. This would allow for both sites to be operated from a central location for staff and equipment; as burial operations will be ongoing at both locations.

The location should also be convenient for residents from all parts of town; this would suggest somewhere near the Town Center. It should be visually pleasing, with a gentle, rolling terrain that aids in creating a peaceful state of mind and sense of tranquility.

**Case Estates**

The announcement from the Arnold Arboretum of Harvard University stating their intention to sell the land commonly known as the Case Estates has sparked many ideas for its use. Among these, the Town should consider setting aside a portion of the property for future cemetery use.

Weston has a rich history in providing exceptional surroundings for residents to inter and visit their loved ones. Patrons and funeral professionals alike continually comment on the beauty and splendor of Linwood Cemetery. The Case Estates land would seem to meet many of the criteria for the establishment of a new cemetery, and allow the Town the ability to continue this fine tradition.
Notes from Meeting at Mount Auburn Cemetery, February 24, 2006

William Clendaniel, Mount Auburn Cemetery
Kay McCahan & Dusty Reeder, Case Estates Review Committee
William O’Neil, Weston Park & Cemetery Division

The first topic of discussion at this meeting was to explore the possibility of converting the Rhododendron garden at the Case Estates into an interment area for cremated remains, and whether there was even a need at this time. At first it was thought that a new cremation garden, which would serve as a satellite to Linwood Cemetery might help to prolong the current life span of the existing burial ground by absorbing some of the interments.

Linwood Cemetery has many areas within its borders not suitable for casket burial due to geological conditions, but which could be easily transformed into cremation gardens. Many of these options were discussed including co-mingling gardens, stone wall niches, columbarium, and traditional in-ground burial. We concluded that acquiring additional land for this purpose was not necessary at this time.

The estimated 50-60 year life span of Linwood Cemetery is based upon the time it will take for all the available space suitable for casket burial to be sold out. While cremation accounts for a portion of all interments, the Achilles heel of any cemetery is the casket burials.

Further discussion ensued on the subject of setting aside Case Estate land for future cemetery use. Ideally, a new cemetery would be constructed as close as possible to the existing one for ease of operation, as burials will be ongoing simultaneously in both for quite some time. However, reserving this land now for a purpose which will not be necessary for at least 50 years may not be practical and would present a very difficult selling point.

This still does not eliminate nor reduce the need for the town to plan for the future in terms of burial space. If cemetery use is not to be part of the current plans for this property, we should not close the door on this option forever. One recommendation would be to set aside a portion of the Case Estates as municipal purpose land, for whatever application, but leaving the possibility for conversion to cemetery use at some point in time.

The land currently occupied by the Woodland School, which abuts Linwood Cemetery should also be taken into consideration. In 50 years time this structure could need to be rebuilt, and could be relocated to another site leaving room for the cemetery to expand naturally.

Respectfully submitted by: William C. O’Neil
March 1, 2006
Appendix 4:– Town-wide mailing, January 2006

Case Estates Review Committee
P.O. Box 378
WESTON, MA 02493-0002
(781)893-7320
website: www.weston.org

January 2, 2006

Dear Weston resident,

We are writing to bring you up to date about recent developments regarding the Case Estates, a historic 62+ acre property in the geographic center of Weston that is owned by Harvard University and that they now wish to sell. The acreage lies in two parcels in “Case Corner” – one on the northwest side of Wellesley Street and another between Wellesley and Ash Streets (see map on reverse side). Owned by the Case sisters through the early 1900’s, the property was farmed until they bequeathed it to Harvard University in 1944. Harvard managed it until the early 1990’s as part of the University’s Arnold Arboretum. The property is a prominent historic landscape with many unusual horticultural plantings and it provides viewscapes that are a reminder of Weston’s rural history as a farm community. It includes two houses and a brick barn on the north side of Wellesley Street.

Last January, the director of the Arnold Arboretum notified the Weston Selectmen that Harvard was prepared to discuss the possible sale of the Case Estates to the Town. In response, the Board of Selectmen appointed our committee - the Case Estates Review Committee - to study and make recommendations regarding the potential acquisition, future use and funding for some or all of the Case Estates property. Harvard is currently preparing engineering studies and will be getting an appraisal of the property. We do not yet know Harvard’s asking price and thus negotiations on a purchase price have not yet begun in earnest. At this time we are not prepared to estimate what that price will ultimately be. Meanwhile, our committee has been hard at work gathering data about projected municipal and community needs and how they might be met on this property. We have talked with representatives from each of the town’s departments, the neighbors in the Case Historic District and also with contacts from other towns that have faced land use decisions similar to this.

The possibilities for the future of the Case Estates range from private development of as many as 29 single family house lots to complete preservation and all variations in between. Each scenario has different benefits for the Town and different financial impacts. Our Committee will be recommending priorities for the site and will be analyzing the viability of purchasing the property so that the Town can control the various ways the land and buildings might be utilized or developed. If it is purchased by the Town, many ideas have been discussed including reserving a portion of the land for future cemetery expansion, selling portions for residential development, using the houses for affordable housing, providing improved circulation and parking for the nearby schools, and preserving portions for open space and important viewscapes. The financial implications of each of these choices will be studied and the Committee will look at using various funding options including Community Preservation Funds, private fundraising, and proceeds from a limited development to fund the purchase of the parcel.
Our Committee is charged with making recommendations to the Board of Selectmen and we expect to accomplish this within the next few months. Residents will be asked to vote on a proposal related to this property at a future Town Meeting.

We believe the Case Estates is a very special place in Town with a long tradition as a historic landscape. We also know that the value of this property for development is high and the resources of our town are limited. We welcome and encourage your comments, suggestions and participation as we attempt to balance potential uses in making our recommendations to the Selectmen. Our meetings are open to the public and information on our Committee’s activities is available at www.weston.org. Besides background material and maps, the website includes agendas, meeting times and minutes. We will continue to keep Weston residents informed by mail as we go forward.

The uncertainty and concern surrounding Regis College’s proposed development further down Wellesley Street makes the need for careful consideration of the future of the Case Estates perhaps even more compelling.

Kay McCahan, Chair
The Case Estates Review Committee
Appendix 5 – Horticultural Report

Report to Kay McCahan, Chairperson
Town of Weston Case Estate Committee

January 30, 2006

From:
Cheryl Lowe
1 Coughlin St.
Acton, MA 01720
C2lowe@verizon.net
978-263-4576

Summary

The Case Estate was used by Arnold Arboretum staff over the years for experimental test plots, nursery projects, and temporary displays of horticultural plants. These displays were intended to be instructive and experimental, not permanent. Remnants of some of those projects remain, but all plants at the Case Estates that were of horticultural significance to the mission or collections of the Arnold Arboretum have been removed, or propagated if they were too large to move.

Prior to the Harvard University’s ownership, the Case Estate was a working, educational farm. A few maps and photographs now in the Arnold Arboretum archives might be useful for determining if any of the trees planted in that earlier era are still standing, however, these references have few plant identification markings. More research and identification during the growing season will be needed to accurately determine if the mature existing trees are original plantings from the Case era.

The local chapter of the Rhododendron Society removed a number of smaller rhododendrons from the Rhododendron gardens at the Case Estate to those at Elm Bank. They are planning to move more plants this spring.

Labels are still present on some plants, but this is not necessarily an indication of their significance. Some specimens are mature and in good health. According to representatives from the Arnold Arboretum and the Rhododendron Society, it would be nice to incorporate these mature, healthy plants into future site plans, but their loss would not be tragic if not appropriate for future users of the site. In other words, decisions about preservation or restoration should be based on aesthetics or landscape function, not on the location of a particular specimen.

Activities related to this report.

I completed the following tasks, as outlined in the contract letter.
• Reviewed materials provided by the Committee.
• Conducted interviews with Arboretum staff who worked at the Case Estate to determine which plantings still at the Case Estate are of significant horticultural value, if any. At the Arnold Arboretum, I met with Julie Coop, Superintendent of Grounds and former site manager of the Case Estate, and Bob Cook, Executive Director of the Arboretum, about collections at the Case Estate and transfer of specimens or propagules from Case Estate plants to the Arboretum. I also talked to Tom Ward, Manager of the Greenhouse, about this topic. I also reviewed the historical records related to the Case Estate housed in the Arboretum archives, working with Sheila Connor, Horticultural Research Archivist, to locate early planting plans and maps.
• I conducted an initial site walk with Kay McCahan and other members of the Committee, and, later, a site walk with George Hibben. George is the designated representative of the Rhododendron Society who helped install and maintain plantings at the Case Estate, was involved with transplanting rhododendrons to Elm Bank, and a propagation volunteer for the Arnold Arboretum working at the Case Estate as well as the Jamaica Plain site. He helped me to assess the value of the remaining rhododendron plantings and a basic evaluation of other plants on site.

Information and references of value.
At the end of the report are a few contacts that might be of value for anyone doing future research at the Case Estate. This list does not include members of the Weston Case Estate Committee or their contacts.

Archives and Historic Maps:
The archives staff has assembled an extensive index of items found in the Case Estate (1896-) Collection VI CE files, although it is still a work in progress. That index (current as of early January 2006) is included at the end of this report. Based on my initial research, the more valuable maps are the following:

Series 1, Subseries C, Map Drawer 8, folder 25 (Case Estate maps 1896-1945)
Within this folder is a bound set of aerial photos dated 1930 showing Hillcrest Farm, the schoolhouse and barn complex, and the plantings behind it and across the street. There are also enlargements of some of the photos in the bound set. I thought the best ones in the series for determining historic conditions for the current site are #58722, #58721, and #58723. The other photos cover areas already sold off or part of the adjacent “40-Acre field” farm.

This folder contains maps of many of the experimental plots and projects. For example, Map 15 (1956) shows a vine collection along Wellesley Street that is no longer there. Some maps are proposed plans, so it is unclear which ones were actually planted as mapped. A few maps do have site-verification notes completed at a later date. Map 13 a, b, and c (Case Estate 1947) show trails, stone walls, some of the early testing plots, the
older rhododendrons, etc. Maps 16 and 17 (1956) might help to date the holly collection, crabapples orchard near the “summer house”, and a small street tree test plot in the northeast corner of the property. Other maps in the same folder show updates to the crabapple collections done in 1955 with most accessions in 1950-1952; a holly (*Ilex*) map updated in 1966; and a 1950 map of the perennial garden (across the street) with rhododendrons for a boundary hedge. It is unclear if this is a planting plan or actual “as-built” of the perennial garden.

**Notes from Site Visits**
Certain areas were highlighted on the map given to me by the Town of Weston Case Estate Committee, and I focused on these areas. I did not find out much about the crabapple collection, although further searching might prove fruitful.

**General Historic Values**
The Arnold Arboretum staff felt that the house and piggery probably had more historic value than any of the remaining plantings. Some specimens are mature, in good health, and may not be readily available in the nursery trade. It has been a while since anyone spent time out there, but the Arnold Arboretum staff could not think of any plants that were important horticulturally. There are some mature specimens whose preservation would be nice, but not imperative.

**Rhododendron Garden area:**
Overall, many are in good condition and some (especially behind the stone wall) have labels. There are some mature specimens that would be sad to lose, but all are found in other rhododendron collections and thus not tragic if lost. Overstory is mostly pine and oak, with some white birch growing behind the stone wall. Many saplings, especially pine saplings, are now established. If desired as a display area, it would take some work to restore and maintain, including thinning or removing some trees and saplings to let in more light.

Notes on specific areas within the Rhododendron garden area:
1. The large plants adjacent to the old lilac field (near the road, east of #131) and heading back toward the stone wall were here before the Rhododendron Society became involved in the 1980’s. George Hibben said that CJ Patterson tried to identify these plants in the early 1990’s but he doesn’t know if a report was ever submitted. By his assessment most are old “Iron-Clad” varieties (*Rhododendron catawbiense/caroliniana/maximum* hybrid crosses with Asian species) as well as Dexter hybrids. We also saw some *Rhododendron maximum* and some large mountain laurels in good health in this area.
2. Area just west of 101 Wellesley St. house has some Ghent hybrids (unlabeled), and lots of multiflora rose, and behind that old yews, some hemlocks and crabapples.
3. Woodland glade: The area behind the big Stone Wall is where the Rhododendron Society worked extensively in a “woodland glade” setting, under an overstory of birch, pine and oak. Immediately behind the wall (on the west side of the opening) are many nice, larger rhododendrons including *R. ‘Helen Everett’, R. ‘Vernus’*
Big, healthy specimens of *Kalmia latifolia* and *Ilex glabra* line the walk from the stone wall to the woodland glade that was the center of the rhododendron garden, although the *Ilex glabra* is now a little overgrown. Many plants were removed by the landscape contractor who moved plants for the Rhododendron Society (he kept some plants in lieu of payment), but the glade is still nicely surrounded by low to moderate-height rhododendrons. (*Rhododendron* ‘Molly Fordham’, *R.* ‘Chinoides’, *R.* bakeri, and others). This is a lovely space aesthetically, but would need mowing, etc to keep it looking good.

**Street Tree Collection area:**
The northeast corner of the property (marked as ‘K’ on the map) is part of an old street tree collection which once went from there south to the old Cow Barn. Much of it is filled with brambles and shrubby cover. A collection of small, sun-loving rhododendrons was located here, but has been moved to Elm Bank. A few tree specimens remain. From the north end moving southward: *Carpinus tschonoskii* (good condition), *Halesia tetraptera* ‘Rosea’ (average to poor condition), *Sorbus alnifolia* (healthy), *Ostrya virginiana* (native, multi-trunk in good condition), *Magnolia x soulangiana* (good condition), and *Magnolia loebneri* ‘Merrill’ (good condition) at edge of turf/birch/swamp intersection. None of these are rare species.

**Teaching Garden:**
According to George Hibben, Daryl Probst was involved with maintenance of this garden and may have some knowledge of what is still here. Many labels for perennials are still here, but identification was not possible in the winter. The four *Euonymus sachalinensis* plants in front of the square space were obtained from Weston nurseries, originally pleated (trained on wires), and are still in good shape. The *Heptacodium* in the back right corner is also in good shape. The *Arborvitae* hedges have been trimmed up by the deer.

**Holly (*Ilex opaca*) collection:**
South end of woodlands behind Teaching Garden and heading north into woods along 2 paths. Many of the remaining plants are healthy, although not unusual cultivars. The larger pine and other tree saplings would definitely need to be removed to let in more light if these are to stay.

**Trees around the buildings.**
The old photographs would tell you if these trees are historic. Of the younger trees, the *Acer griseum* is “one of the nicest around” (healthy, accession number unknown), while the *Euonymus bungeana* is old and showing its age. Behind the yellow house is an Umbrella Pine (*Sciadopitys verticillata*), probably 30 years old by George’s guess.
The Nose
We walked through “the nose” in January, so without labels, it was difficult to identify the tree species. The Arnold Arboretum said they took cuttings of everything they wanted, so the value of these trees is aesthetic, and perhaps historic, but not horticulturally important. See notes about historic maps for possible leads.

Perennial Garden
Nothing is left of the old perennial garden. A few of the trees framing the space are nice, such as the Metasequoia and mature Chionanthes near here, but it is unclear if they are on the adjacent 102 Wellesley St. residence property or not.

Variegated conifers along road
These were planted for screening or demonstration, but are not horticulturally significant.

Possible Other Useful Contacts:

Patrick Willoughby, formerly at the Arnold Arboretum and now at Wellesley College
   Patrick Willoughby, Associate Director
   Physical Plant Administration
   E-mail: pwilloug@wellesley.edu
   Phone: (781)283-2755

C J Patterson, Rhododendron Society member who attempted to identify the old rhododendrons at the Case Estates. Her phone number is 781-826-6009 or email is chaspatt@comcast.net.

Sheila Connor, Horticultural Research Archivist
   Arnold Arboretum Horticultural Library
   125 Arborway
   Jamaica Plain, Massachusetts 02130
   Phone: 617-524-1718 x 111
   Email: Sheila_Connor@Harvard.edu

The author of this report, Cheryl Lowe, was the Horticulture and Botanic Garden Director for the New England Wild Flower Society for the past 14 years. She is currently working as an independent consultant specializing in native plants, and teaches locally. She is co-author of the 2005 revised Peterson Field Guide to Ferns and Their Related Families, and currently serves on the Acton Conservation Commission. She holds a BS in Plant Ecology from Cornell University, MS in Public Horticulture Administration from Longwood Graduate Program, University of Delaware.)
Appendix 6: Map #1 – Existing Land Use
Appendix 6: Map #2 --Build-out plan
Appendix 6: Map #3—Land Use Plan (with Trails)
Appendix 6: Map #4 – Land Use Plan Alternatives
Appendix 6: Map #5 – Land Use Plan Development
Appendix 7 - Where will the proceeds from the sale go?

Funds from the sale of the Case Estates will be used to establish an endowment whose income will support the mission of Harvard's Arnold Arboretum in Jamaica Plain. It is a way of putting the money in the hands of the Harvard Management Company to maximize earnings for the Arboretum. The major priority for the Arboretum right now is investment in its research mission to build upon major advances in genetics and molecular biology that have happened over the past couple of decades. The Arboretum will be appointing senior research scientists and constructing new research laboratories and greenhouses to support the highest quality researchers.

While making this major investment in research, the Arboretum does not want to cut back on its traditional commitment to both their collections and landscape, and to public education, and they will advance on these fronts as well. For more information go to www.arboretum.harvard.edu/aboutus/aboutus.html and click on "Long-Range Planning and Facility Needs" to view the long-range plans described briefly in the document entitled, "A Time for Change".
Appendix 8:- Principles Guiding the Case Fund

1. A Case Fund is being established to raise monies to supplement public funds being used to acquire the custody and control of the whole or parts of the property known as the Case Estates.

2. No goods or services will be received for donations to this Fund.

3. After total acquisition of the Case Estates, the future planning for the Case Estates will be subject to the recommendation of the Board of Selectmen and vote of subsequent Town Meetings.

4. After the property is secured by the Town of Weston, private funds may also be used from the Fund for the management and care of the property. The Selectmen will be in charge of this management function.

The following three land planning studies were undertaken over the past decade to determine priorities for land conservation. The community was struggling with increasing development pressures and a decreasing inventory of open land. It seemed important for the town to prioritize its goals and identify proactive strategies that could be utilized to protect its vital interests.

**Open Space and Recreation Plan for the Town of Weston (1996-1997)**

**Committee to Advise Selectmen on Land Acquisition (CALA 2000)**

**Community Preservation Plan (2002)**

Through careful study of existing conservation land and remaining undeveloped parcels, along with development of criteria, these three master planning efforts all identified the Case Estates as a top priority. These studies concluded that, given the town’s previous success in acquiring conservation land, we needed to be highly selective when it came to adding additional acreage. Among the desirable characteristics often cited were the following: prominent location, viewscapes, trail connections, wildlife habitat, relationship to historic buildings, and contribution to rural character. The Case Estates has all these attributes.

The following statement in the CALA report is representative of the findings in all three land planning studies:

**The Case Estates**

The Case Estates is made up of two parcels. One parcel on the west side of Wellesley Street contains 40.92 acres. The other parcel located between Wellesley and Ash Streets contains 22.68 acres. The property is owned by Harvard University, Arnold Arboretum and is tax-exempt. The Case Estates received the unanimous vote of the CALA;

“The Committee unanimously recommends that the Selectmen initiate discussions with the Arnold Arboretum and Harvard University with the goal of acquiring or controlling the future of the Case Estates property in its entirety.

The strategic value of this property to the Town and its vulnerability to change convince us that the time has come to secure its future.”

**Strategic Value**

The strategic, public values inherent in the Case property are several.
• **Location** - Centrally located at the cross roads of Weston, the property adjoins three busy arterial roads (Ash, Newton and Wellesley), Alphabet lane, Field School and Regis College. Also in the vicinity are the Woodland School, the Country School, Linwood Cemetery, the Library and the Community Center. What happens to the Case property will have a major impact on the future of this important neighborhood.

• **Viewscapes** - The spacious views of fields, walks and plantings that comprise the Case Estates define the visual character of the central landscape, and for many residents are the most lovely in Town. Development of these vistas would dramatically alter the nature of the landscape and detract from its refreshing, rural aspect.

• **Utility** - The gently rolling terrain and well-drained soils of the Case property make it highly suitable for many uses. A study of the property by Matlock Associates indicated that the property could be subdivided into residential lots under current zoning regulations. The back land on the west side of Wellesley Street might be appropriate for municipal purpose such as cemetery without significantly changing the visual appearance from the road.

• **History** - The close relationship between the town and the Case Estates goes back nearly a century when the Case sisters began to develop land for agricultural education. In the 1940's the sisters gave the property (nearly 200 acres) to the Arnold Arboretum for horticultural use. Shortly thereafter the Town purchased some 43 acres from the Arboretum for school construction. It is on these parcels that the Field, Country and Woodland Schools, Memorial Pool, Scout House, Case House school administration building and the Library now stand and on which the Community Center is now under construction. In 1985 the Town acquired the "forty acre field" parcel to prevent its proposed sale for residential development. This is a remarkable history of the Case land serving as a resource for Weston.

**Vulnerability**

Throughout its sixty-year ownership of the Case Estates, the Arnold Arboretum has been a good neighbor to Weston. For years the property was used for display gardens, as a holding nursery, and for educational purposes. In 1990, however, the mission of the Arboretum became more focused on the Jamaica Plain site and active use of the Case Estates was largely discontinued. To simplify maintenance, residences on the property, with, one exception, sold off. The Case Estates are now considered surplus to the Arboretum's long term plan. During the changes of the last decade, the Arboretum's Director, Dr. Robert Cook, has kept the Town apprised of his plans for the property and welcomed communication from interested
parties. In response to concerns that the land might be sold, Dr. Cook pledged a "rolling moratorium" on land (but not house) sales, promising during his tenure to give Weston 18 months advance notice should there ever be a discussion to dispose of any property. In the last decade, a number of developed uses were proposed for the Case property, but none ever materialized.

Recently there has been some "nibbling around the edges" with adjoining private landowners seeking to acquire pieces of the Case land to enlarge their lots. Currently, plans are underway to sell the remaining house at 131 Wellesley Street and move it to the adjacent field, (ANR) have been designated (though not yet submitted to the Planning Board) for the west side of Wellesley Street. Considering the Arboretum's changed mission, the development pressures in Weston and the suitability of the Case land for build out, the Committee feels that this property is vulnerable to change and that a development offer to purchase the Case Estates would force the town into a reactive position. In view of this risk and the numerous public values at stake, we urge the Selectmen to adopt a proactive approach to secure the future of this vital property.”

Editor’s Note: This excerpt is from the CALA Report 2000. This was an analysis of all properties over 10 acres done for the Board of Selectmen. Case again was priority number one. It was also at this time Harvard Real Estate had just sold the pink barn and the land around it which was the previous location of the ground cover collection. Additional land was sold such that access became limited to the famous free standing stone wall. Moreover, three “Approval Not Required” lots were created on Wellesley Street. It was after this that the Selectmen wrote to Harvard asking to initiate discussions such that the Town could obtain control of the Case Estates.