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TOWN OF ROYALSTON Whitney Hall Feasibility Study

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ANNEX A. TRAHAN ARCHITECTS SITE ASSESSMENT REPORT



1. Introduction

The Town of Royalston engaged Keen Independent to conduct a feasibility study for the future use of Whitney Hall, a historic building that was constructed in 1905 and has historically been an iconic part of the South Royalston community. The building currently houses town offices on the first floor and storage on the second floor. The Town values the external appearance of the building which received new siding, repairs and paint in summer 2023, but the building interior and structure have suffered substantial deterioration over time due to deferred maintenance.

This summary report includes the following topics:

- Existing conditions analysis;
- Exploration of marketing potential;
- Challenges;
- Community feedback;
- Case studies;
- Assessment of options;
- Potential funding sources; and
- Conclusions and recommendations.

History of Whitney Hall

Whitney Hall, which housed the South Royalston School, was constructed in 1905 to replace the previous school building that burned down the year prior. The building provided school rooms on the first floor and on the second floor, a large hall with a performance platform at one end and a kitchen at the other.

The South Royalston School based at Whitney Hall closed in 1996. Today, past students still gather at events organized by the South Royalston School Reunion Association.

1-1. Whitney Hall exterior (prior to summer 2023 improvements)



Source: Keen Independent Research.

Limitations. Keen Independent gathered data from a variety of internal and external sources to provide information that is useful for reviewing the Royalston marketplace as of January 2024. Organizational, economic and marketplace conditions are in constant change. Analysis is based on data available at the time without knowledge of future conditions. Information may become outdated.

Keen Independent cannot express or imply representation or warranty on all of the data sources and resulting analyses in this report, which draw on a combination of primary and secondary research. We take precautions to ensure the accuracy of all primary research data and to evaluate the reliability of secondary sources to the extent possible.

Note: Keen Independent does not provide financial advice.

2. Existing Conditions Analysis

Keen Independent Research engaged Trahan Architects to provide a site assessment report for Whitney Hall located in Royalston, MA. The site assessment took place on Monday June 12th, 2023. The site assessment's primary scope was to review existing fire/life safety, mechanical, electrical, and plumbing systems and provide an overview of structural and envelope building components. See Annex A for the full site assessment report.

Assessment Summary

Every building is unique, and the need for maintenance, repairs and asset renewals varies depending on many factors, including use of the building, the quality of construction, design details, exposure and environmental conditions and the standard of care given by the owner and facility management team.

Maintenance. There is evidence that funding for principal asset renewal, maintenance or replacement was not adequately established. This has contributed to the accelerated deterioration of major building components and systems that are long past the end of their useful service cycles – as we observe today – that require replacement.

Improvements needed. Significant improvements would be required to bring the building up to date with accessibility standards. Upgraded building systems and structure should be assessed in further detail and considered in all circumstances.

Overall assessment. Trahan Architects' assessment, based on the age, history of past repairs/upgrades, and based on the evidence gathered from their surveys and investigations, concluded that Whitney Hall's current conditions are rated at the end life cycle overall and will require a large and expensive asset renewal project. Significant funds will need to be reinvested in the building and standard operating budgets will need to be revisited.

2-1. Inside Whitney Hall



Source: Keen Independent Research.

3. Exploration of Marketing Potential

Keen Independent gathered demographic, spending and market potential information about the population from the following market areas that we defined with the Town:

- Primary market area (within about 10 minutes of driving);
- Secondary market area (within about 20 minutes of driving);
- Tertiary market area (within about 40 minutes of driving); and
- Regional market area (within about 60 minutes of driving).

Figure 3-2 presents a market area map for Whitney Hall displaying assets such as public buildings, parks and conservation land near Whitney Hall.

The market area closest to Whitney Hall by drive time (less than 10 minutes) is the irregularly shaped area indicated with diagonal hatching at the center of the inset map. Additional market areas range from the darkest shade of purple without hatching, about 10 to 20 minutes to Whitney Hall and a light purple for the area that is about 20 to 40 minutes away. The market area that is about a 40 to 60 minute drive is indicated by the lightest shade of purple and extends on the West and North sides to Greenfield, Brattleboro and Keene and on the Southeast side to Worcester.

Population characteristics. In Figure 3-1, we provide a sample of the characteristics studied. For more population characteristics, see Appendix A.

Income. Primary and regional market areas have higher median incomes than the secondary and tertiary market areas. The primary and regional median incomes are also higher than the national average.

Age. The population of Royalston's market areas is older on average than the national average. The primary market area is substantially older, about eight years above the national average.

Housing. The rates of housing vacancy in the Royalston market areas are comparable to the rate in the United States overall. At 9 percent vacancy for homes and rental units, Royalston is within a "healthy" range where supply is expected to be adequate for demand.¹

Disability status. The rate of households that include persons with disabilities in the regional market is comparable to the rate nationally. The rates of persons with disabilities are slightly higher in the secondary and tertiary markets than the national average.

¹ Vacancy rates that are too low indicate demand is exceeding supply and that a community may have a housing shortage. According to a recent synthesis of economic literature produced by The Boston Foundation, "A healthy vacancy rate is when the market has enough inventory to account for the natural mobility of households." The report goes on to indicate that, "A healthy vacancy rate is often considered to be two percent for home ownership and six percent for rentals, by industry standards." By

either benchmark, Royalston's vacancy rate would be considered sufficient to meet demand. (See The Greater Boston Housing Report Card, 2021, Chapter 3 at <https://www.tbf.org/news-and-insights/reports/2021/jun/greater-boston-housing-report-card-2021/gbhrc2021-chapter-3#:~:text=By%202019%2C%20the%20homeownership%20vacancy,two%20and%20six%20percent%20benchmarks.>)

3. Exploration of Marketing Potential

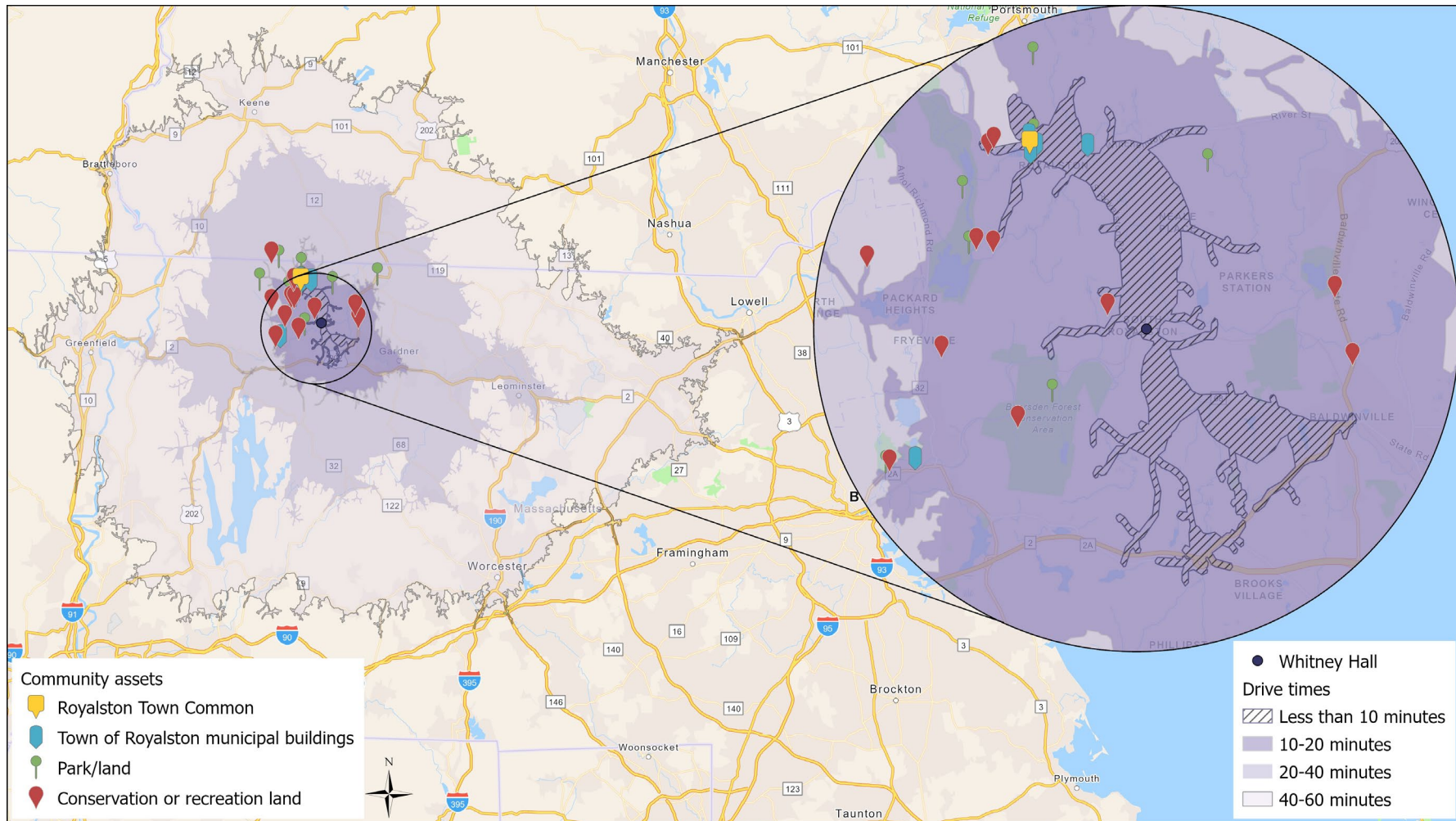
3-1. Characteristics of Whitney Hall market area population, 2022

	Primary market	Secondary market	Tertiary market	Regional market	United States
Total population	885	34,369	196,803	854,401	335,541,003
Median age	47	43	42	40	39
Total households	329	14,036	77,706	329,880	128,586,317
Median household income	\$ 84,249	\$ 71,218	\$ 75,848	\$ 81,506	\$ 72,406
Vacant housing units	9 %	10 %	8 %	7 %	10 %
Households with 1+ person with a disability	22 %	28 %	27 %	25 %	26 %

Source: U.S. Census Bureau American Community Survey, Keen Independent Research.

3. Exploration of Marketing Potential

3-2. Community assets near Whitney Hall



Note: The market area closest to Whitney Hall by drive time (less than 10 minutes) is the irregularly shaped area indicated with diagonal hatching at the center of the inset map. Additional market areas range from the darkest shade of purple without hatching, a 10 to 20 minute drive to Whitney Hall, and a light purple for the area that is a 20 to 40 minute drive. The market area that is a 40 to 60 minute drive is indicated by the lightest shade of purple and extends on the West and North sides to Greenfield, Brattleboro, and Keene and on the Southeast side to Worcester.

Source: Esri, NASA, NGA, County and City of Denver, HERE, Garmin, SafeGraph, METI/NASA, USGS, SafeGraph, EPA, NPS, USDA, Keen Independent Research.

3. Exploration of Marketing Potential — Spending and behavior

Here are some key spending and behavioral characteristics of the population within each market area. For more characteristics, see Appendix A.

Spending Potential

Figure 3-3 provides some key spending potential indicators. The spending potential index (SPI) compares the average amount spent locally for a product or service to the average amount spent nationally. An index of 100 reflects the national average; an SPI of 70, for example, indicates that average spending by local consumers is 30 percent below the national average.

The primary market has the highest median income of Royalston's market areas as previously shown in Figure 3-1. The regional market is a close second on median income. However, the regional market, though close in income to the primary market, spends substantially more in every category. This may reflect that opportunities are more abundant in the regional market than in the primary market.

Market Potential

Figure 3-4 illustrates market potential for certain outdoor recreation behaviors. Market potential index (MPI) measures the relative likelihood of adults in the specified area exhibiting certain behavior or purchasing patterns. An MPI of 100 represents the U.S. average.

The populations in Royalston's market areas participate in many outdoor recreation activities at or substantially above the national average. These indicators demonstrate a strong inclination toward outdoor pursuits and the potential for the Town of Royalston to position itself as having abundant outdoor opportunities and a community of outdoor enthusiasts.

3-3. SPI for certain types of spending by Royalston market area, 2022

	Primary market	Secondary market	Tertiary market	Regional market	United States
Entertainment/recreation					
<i>Index</i>	94	86	93	108	100
Average	\$ 3460	\$ 3,141	\$ 3,429	\$ 3,949	\$ 3,698
Live entertainment-catered affairs					
<i>Index</i>	97	88	98	118	100
Average	\$ 14	\$ 13	\$ 14	\$ 17	\$ 100
Cash gifts to charities					
<i>Index</i>	104	86	96	113	100
Average	\$ 390	\$ 324	\$ 363	\$ 428	\$ 365

Source: Esri's U.S. Consumer spending data based on the Consumer Expenditure Survey (CEX) from the U.S. Bureau of Labor Statistics, U.S.

3-4. Outdoor recreation market potential indices over a 12-month period, 2022

	Primary market	Secondary market	Tertiary market	Regional market	United States
Have a ...					
Garden	43 %	40 %	41 %	40 %	38 %
<i>Index</i>	114	107	108	107	100
Participated in...					
Birdwatching	8 %	7 %	7 %	7 %	6 %
<i>Index</i>	139	112	116	114	100
Canoeing or kayaking	10 %	8 %	8 %	8 %	7 %
<i>Index</i>	134	116	115	112	100
Fishing	14 %	12 %	12 %	10 %	11 %
<i>Index</i>	131	109	109	96	100
Hiking	20 %	16 %	17 %	18 %	16 %
<i>Index</i>	122	101	104	110	100

Source: Esri market potential database based on MRI Simmons Survey (2022).

3. Exploration of Marketing Potential — Population projections

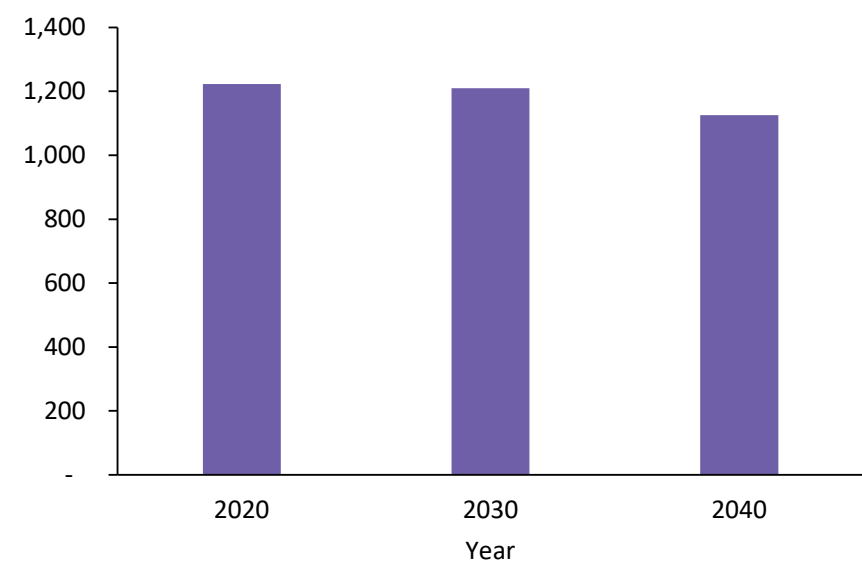
Keen Independent examined population forecasts developed by the UMass Donahue Institute Population Estimates Program. The Town of Royalston is projected to decline in population in the coming decades.

Population forecasts. The UMass Donahue Institute Population Estimates Program forecasts the Town of Royalston population will decline about 7 percent in total residents from about 1,200 in 2020 to about 1,100 in 2040 (see Figure 3-5).

According to these data, the Town of Royalston population is expected to decrease at a rate of about 0.4 percent annually. The introduction of broadband to Royalston in September 2023 could potentially bring positive economic and population impacts. However, on a small population base, potential growth is unlikely to result in a dramatic change in the number of residents. See Appendix A for additional discussion of this topic.

The Town of Royalston’s population is projected to age over time (as shown in Figure 3-6). Demand for different types of businesses, services, activities or events tends to vary by age group, so understanding projected population changes can help the Town of Royalston consider what types of opportunities and services may be in demand over time.

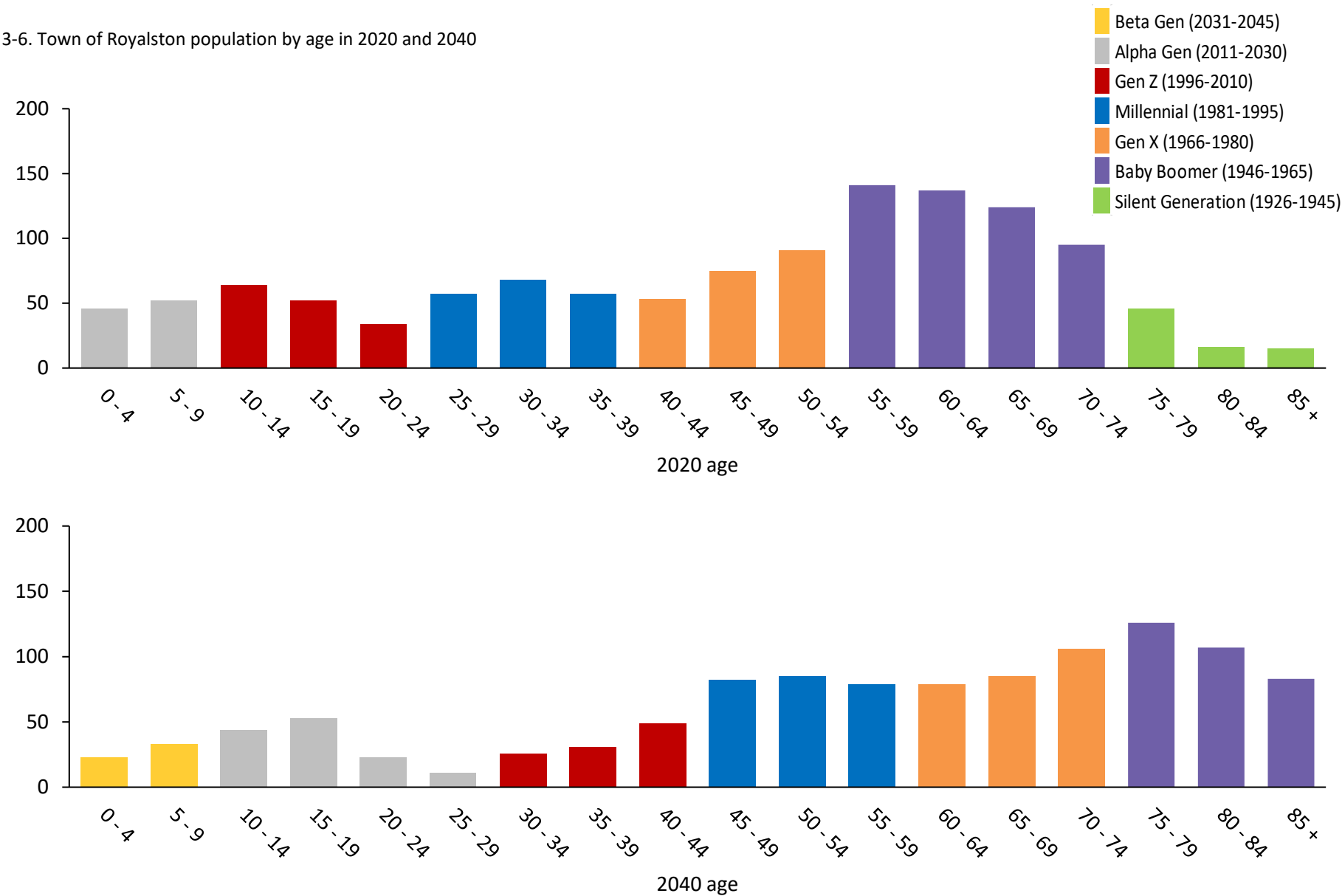
3-5. Population projections for the Town of Royalston, 2020–2040



Source: Umass Donahue Institute Population Estimates Program, Keen Independent Research.

3. Exploration of Marketing Potential — Population projections

3-6. Town of Royalston population by age in 2020 and 2040



Source: UMass Donahue Institute Population Estimates Program

3. Exploration of Marketing Potential — Environmental scan

The study team inventoried businesses and organizations by type within a 15-mile radius of Royalston. In selecting categories potentially relevant to the project, the study team considered:

- Categories related to suggestions community members offered for future uses of Whitney Hall;
- Categories where the presence of businesses might create competition for certain ideas suggested for Whitney Hall; and
- Categories where the absence of businesses in the local area might be relevant.
 - Absence of businesses in certain categories might indicate unmet community needs.
 - Absences might also reveal a lack of existing consumer activity (a built-in customer base) that could make attracting new businesses or investors more difficult.

See Appendix A for the methodology Keen Independent used when compiling the inventory of organizations and businesses.

As shown in Figure 3-7, there are few businesses in the categories examined that are located near or in Royalston. This analysis suggests that a new endeavor based at Whitney Hall would face little competition in the local market. Lack of competition can be a positive for new ventures that are looking to meet an unmet need in an area in which potential consumers are already present due to other businesses.

However, this analysis also indicates that the absence of businesses and organizations in the area would likely create challenging conditions for a new businesses venture. A new initiative at Whitney Hall would not be able to take its place in an already promising hub of activity and tap into existing consumers in the area; it would need to attract them independently. For certain types of prospective businesses, the absence of consumer serving businesses and organizations would inhibit their ability to attract patrons. For example, a developer looking to create an inn or overnight lodging would likely seek a location where guests could also enjoy dining, go shopping or participate in attractions.

3. Exploration of Marketing Potential — Environmental scan

3-7. Inventory of organizations and businesses by type within 15 miles of Royalston

	Less than one mile	Between 1 and 4.9 miles	Between 5 and 9.9 miles	Between 10 and 15 miles	Total businesses
Recreation	1	13	123	153	350
Arts, culture and education	0	1	38	57	96
Dining, shopping and hospitality	<u>0</u>	<u>5</u>	<u>151</u>	<u>222</u>	<u>378</u>
Total	<u>1</u>	<u>19</u>	<u>312</u>	<u>432</u>	<u>824</u>

Source: Dun & Bradstreet, Keen Independent Research.

4. Challenges

Factors in the surrounding community and in Royalston as a whole impact the feasibility of possible future purposes for Whitney Hall. The study team analyzed community circumstances that are intertwined with the feasibility assessment for Whitney Hall. Here we provide an overview and selected examples of such circumstances. Appendix B provides a description of research methods and additional details.

Consumer Services and Amenities

South Royalston has valuable services but lacks consumer-facing businesses which limits the marketability of Whitney Hall.

Town services. South Royalston has public water and sewer, an asset and potential selling point. The Town installed broadband in 2023.

Consumer-facing businesses. Lack of outlets for food and beverages, groceries or basic supplies and other services are potential barriers to developers, potential telecommuters and tourism. The Town's only restaurant burned down in 2018. The Town's Country Store closed in March 2023 and remains for sale at the time of this report.

Outdoor Recreation Access

South Royalston is proximate to beautiful outdoor recreation resources, but barriers currently limit their access and use. The community is not currently prepared to activate these resources to increase outdoor recreation-related tourism.

Trail system access. Whitney Hall is located near the trailhead of a three-mile path along Millers River into the Bearsden Conservation Area in Athol but the bridge that previously provided pedestrian and bicycle access from South Royalston is closed due to safety concerns. A group of community members are working on securing funding to repair the bridge and restore foot traffic access.

Outdoor areas. Royalston is home to eight public or nonprofit outdoor recreation areas. However, the Town lacks signage, amenities and funding to attract, support and manage increased ecotourism.

Millers River. Large concrete train bridge remnants dot Millers River near South Royalston, posing safety concerns for water recreation.

Municipal Assets/Competition for Public Resources

Whitney Hall is not Royalston's only municipal asset that requires investment or upgrades. It competes for limited taxpayer and other resources with other municipal properties. For example:

- **Town Hall.** Ongoing maintenance and repair for the 1867 Town Hall must be budgeted proactively and appropriately to prevent a costly backlog of deferred maintenance.
- **Phineas S. Newton Library.** The Town's library is inaccessible to patrons with mobility impairments.
- **Raymond School.** The Select Board approved a plan to repair and repurpose the building but funding for completion of the project has not been secured.
- **King Street Bridge.** Without repairs, the condition of this bridge may threaten the Town sewer line.

See Appendix B for additional examples of Royalston's assets.

Zoning

Restrictive zoning in South Royalston limits current development options. See Appendix B for discussion of current zoning limitations and efforts to introduce more flexibility through a zoning overlay.

5. Community Feedback

Keen Independent facilitated community input about preferences and ideas for the future of Whitney Hall as a community asset. Methods of engagement included the activities below. A detailed analysis of these engagement methods is provided in Appendix C.

Community “virtual workshop” survey. Keen Independent used an online platform to gather community input about potential purposes for Whitney Hall. This virtual workshop survey emphasized open-ended questions and was designed to gather qualitative data in addition to quantitative data. The virtual workshop survey ran from mid-June to mid-September and collected 65 responses.

Public meeting. Study team members facilitated a public meeting to solicit community input about Whitney Hall in June 2023. The session was held in Town Hall and included a short presentation about the project and activity stations that invited both interactive and anonymous participation. About 21 individuals attended this meeting.

Interviews, small group discussions and other communication portals. Study team members facilitated interviews and small group discussions with key stakeholders identified by Town leadership. We also created a designated study email and hotline to maintain a constant open line for public input throughout the study process.

Participation. In total, the study team gathered input from approximately 46 interviewees, group discussion participants and communication portal submissions.²

² This number is approximate and may count some stakeholders more than once if they participated in more than one group discussion due to holding multiple roles or affiliations.

5-1. Public meeting in Royalston’s Town Hall, June 12, 2023



Source: Keen Independent Research.

5. Community Feedback — Key findings

Here, we provide an overview of key findings from stakeholder input. These findings are described in greater detail in Appendix C.

Royalston

Royalston community members and other stakeholders provided their perspectives on Town needs. Comments reveal a lack of consensus about Royalston's desired future and greatest needs.

What Royalston should be in the future. Participants most frequently indicated that Royalston should be “a town that preserves a quiet way of life” and “a town where people choose to raise a family.” They also frequently selected options related to outdoor recreation and protecting historic properties. Town members least frequently said that Royalston should be “a town with access to good jobs,” “a great place to grow a small business” or “a town with a vibrant local economy.”

Royalston's greatest needs. In contrast to the low ratings for economic activity related aspirations for Royalston's future in the prior question, stakeholders most frequently indicated that Royalston's greatest need is generating economic activity.

Whitney Hall

Keen Independent asked stakeholders to describe what comes to mind when they think about Whitney Hall. Three common themes emerged:

- **A former icon with future potential.** Words such as “essential,” “iconic” and “sleeping beauty” reflect hope that Whitney Hall's future might include revitalization.
- **Nostalgia.** Some mentioned fond school day memories.
- **Lost cause.** Many used words such as “burden,” “money pit,” “white elephant” and “dump.”

I don't want a lot of businesses ... things like gas stations. That's not the character of our town. We also don't have any money, [so] that makes it difficult to decide if you want to attract more ... [The Town] [has] very much been a bedroom community.

[We need] the ability to capture and monetize the incredible volume of people who come through town to see our natural resources

There used to be a coffee shop and music at the gazebo. The market was open too ... You can't even get a hot dog when you're done hiking.

It's hard for a community like Royalston – a lot of the [issues] are tied to economic development.

Be financially able to continue as a town.

[Whitney Hall] is a bit of a burden now, but it could with the right plan be a tremendous asset to South Royalston.

Whitney Hall was built as a place for the community to come together; [the] second floor is special and should never be replaced.

This is an old, dilapidated building, [and] painting it will only make it look good, but it's rotting away.

5. Community Feedback — Key findings

Potential purposes. Community members tended to favor the idea of using Whitney Hall to meet a high priority community need or generate economic activity. Although community members identified generating economic activity as a priority, ratings tended to disfavor or reflect divided opinion about specific potential purposes such as arts and culture, tourism, dining or use as offices.

Among the purposes rated, using Whitney Hall to provide space for town gatherings, meetings and events was rated most positively but still reflected community division. About 47 percent agreed or strongly agreed with this purpose; 34 percent disagreed or strongly disagreed.

Preserving Whitney Hall. Some community members described maintaining Whitney Hall as a community obligation. Some linked their support for investing in Whitney Hall to feelings that South Royalston has been a lesser priority than the north side.

Selling or demolishing Whitney Hall. Some community members indicated that preventing maintenance and repair costs from burdening the Town and residents and causing neglect of other Town obligations is a key priority. More residents agreed that “Whitney Hall should be maintained only if it can be done at little to no cost to town” than disagreed.

Most virtual workshop survey participants indicated they were open to selling Whitney Hall to a private party with about 57 percent agreeing or strongly agreeing. Some community members indicated that they see little future for Whitney Hall other than demolition, expressing skepticism that a sale is realistic given the building’s condition.

Ratings indicate a strong divide on the question of demolition. About as many participants agreed or strongly agreed they were open to Whitney Hall being torn down as disagreed or strongly disagreed.

Whitney Hall is a Town asset. We need to take care of it, [and] we need to find the money ... This is part of the village ... it’s iconic.

South Royalston should not be forgotten! The town needs to accept the responsibility of maintaining this building and giving it back to the people!

You could try to sell or give it to a for-profit developer, but I doubt anyone would take it. Best would be to tear it down and use the land for something the whole town or South Village needs.

We live in West Royalston and need brush cut and roads paved, and our cemetery taken care of. [If] the Town doesn’t have money for any of that, then we shouldn’t have millions of dollars for Whitney Hall.

Sell it and put the funds into the Raymond building for new town offices.

Tear it down. There is no for-profit, non-profit, or municipal use that would be cost-efficient with bringing it up to code, not to mention the long-deferred maintenance. It would probably be cheaper to tear it down and build a new replica.

Rip it down and fix the roads, get someone to fix and run the Country Store because there isn’t even ONE PLACE IN THE WHOLE DAMN TOWN TO EVEN BUY A CUP OF COFFEE.

6. Case Studies

Keen Independent developed profiles of relevant case studies for Royalston's Whitney Hall. These case studies were sourced from suggestions from Royalston community members.

Concepts explored. We reviewed case studies with operations related to retail, affordable housing, recreation, tourism, and offices as well as case studies that explored the demolition of a historic public building.

Appendix D features case studies of the following facilities:

- Petersham Country Store, Petersham, MA;
- Bedford Farmhouse, Bedford, MA;
- Orange Community Boathouse, Orange, MA;
- Nichewaug Inn, Petersham, MA;
- Princeton Center School, Princeton, MA;
- Red Apple Farm, Phillipston, MA;
- Orange Innovation Center, Orange, MA; and
- Wheeler Mansion, Orange, MA.

Overall Findings

Keen Independent identified the following themes:

- Historic buildings can be adapted as community gathering places and for attracting tourism;
- A restoration project requires significant investment and identified champions to spearhead the effort;
- Lack of community consensus can prevent action, in some cases leading to no viable option other than demolition; and
- If the Town is unable to support the upkeep and a consensus cannot be reached regarding the use of Whitney Hall, demolition could be an alternative option.

6-1. Nichewaug Inn



Source: Wikipedia Commons.

7. Assessment of Options

Figure 7-1 provides an overview of options for the future of Whitney Hall organized into a matrix along two dimensions: degree of community control/ownership and cost.

Renovate

Adaptive reuse of the historic building could be designed to meet community needs, to drive economic activity in South Royalston or to otherwise improve the quality of life. This option would enable the community to maintain a high degree of control over the building, but at a substantial upfront cost. Estimates begin at \$4.7 million or more.

Defer Decision

In this scenario, the Town would “mothball” the building, taking necessary steps to shut down building systems and seal the interior to prevent damage and minimize further deterioration. Town offices would need to be consolidated into another municipal property in order to end occupancy of the building.

Shared Investment

Partnering with private entities can offer an avenue to expand financial capacity and achieve public goals. However, finding a willing partner can be challenging and still requires a substantial upfront cost/investment. This option involves significant legal and negotiating considerations.

Sell or Demolish

The Town could relinquish ownership of Whitney Hall by selling or demolishing it. Selling Whitney Hall might be accomplished by offering substantial incentives, possibly with no strings attached where the Town would have little say outside zoning about the property’s future. Demolishing Whitney Hall would remove the building from the Town’s inventory but could maintain the land, which the Town could repurpose or sell.

7-1. Matrix of options for Whitney Hall

	Higher cost	Lower cost
More ownership	Renovate Meet community needs or improve quality of life For revenue-generating purposes	Defer decision Mothball (i.e., no occupancy) Conduct broader strategic master plan for the Town
Less ownership	Shared investment Issue RFP to seek partner Share costs and responsibility	Sell or demolish Sell with incentives Demolish

Source: Keen Independent Research.

8. Potential Funding Sources

Keen Independent assessed funding options for Whitney Hall and classified them into the four categories below. See Appendix E for more detail about each potential funding source.

Public Funding Through Federal or State Programs

Examples of potential public funding options include the following:

- Community Preservation Act (CPA);
- United States Department of Agriculture Rural Community Development Initiative;
- National Trust for Historic Preservation;
- Massachusetts Community One-Stop for Growth;
- Massachusetts Historical Commission; and
- Potential public building program for rural communities

Public Borrowing/Taxpayer Support

Royalston could borrow funding to support Whitney Hall. Municipal bonds are options that enable communities to finance public works exempt from state and federal taxes and repay the debt over time.³ Achieving Town consensus is critical to enable borrowing and related tax increases. In Massachusetts, for a Town Meeting to authorize borrowing requires a two-thirds vote.⁴ Repayment of debt typically requires a property tax increase that requires voter approval under the provisions of Proposition 2 ½, a state law passed in 1980 that limits property tax increases to 2 ½ percent annually.⁵

³Massachusetts Division of Local Services (January 2020). Understanding Local Debt. <https://www.mass.gov/doc/understanding-municipal-debt/download>

⁴ Ibid.

Private Investors

Private investors or developers may invest solely or as part of a public-private partnership in the adaptive reuse of a historic property if doing so presents a viable option for achieving their business goals. However, no stakeholder who provided input to the study team was aware of any potential investors affiliated with or interested in Royalston with the means or interest to invest in revitalizing and repurposing Whitney Hall.

Private Donors

Philanthropy is another revenue source that is sometimes employed for adaptive reuse or preservation of historic properties. However, charitable giving is unlikely to be a feasible solution for Whitney Hall.

Philanthropic contributions result from intentional fundraising efforts. Unanticipated, surprise gifts from major benefactors are exceptionally rare. Royalston does not currently have a well-developed culture of fundraising and philanthropy. Town members described grassroots fundraising efforts in Town as generating modest sums and as difficult to sustain through volunteer efforts.

No stakeholder who provided input to the study team was aware of any potential individual benefactors affiliated with or interested in Royalston with the means or interest to contribute substantially toward Whitney Hall. Royalston lacks a base of businesses or corporations that might provide support and research did not identify foundation prospects that are a good match for Whitney Hall renovation.

⁵ Massachusetts Division of Local Services. Levy Limits: A Primer on Proposition 2 ½. <https://www.mass.gov/doc/levy-limits-a-primer-on-proposition-2-12-0/download>

9. Conclusions and Recommendations

Currently, the Town of Royalston lacks the resources to entertain renovation, shared investment or demolition of Whitney Hall. Lack of consensus around these options creates an impasse, preventing the Town from securing funding and obtaining approval. Selling the building might be economically feasible but would require overcoming divided opinion. A sale would also foreclose future options that could be valuable for Royalston to consider in the context of a larger Townwide planning process.

Recommendations

Keen Independent finds that the Town of Royalston has only one viable option at this time: deferring the decision. We recommend that the Town of Royalston consider:

- Placing the decision about Whitney Hall on hold for the time being;
- Temporarily “mothballing” Whitney Hall to minimize risks and costs (ending occupancy, closing down and sealing the building and its systems);
- Undertaking a Townwide strategic master planning process; and
- Using the Townwide master planning process to build consensus about community priorities and the potential strategic role Whitney Hall might play in Royalston’s future.

At a Town public meeting in November 2023, Keen Independent presented the preliminary recommendation that the Town should undertake a strategic master planning process before determining Whitney Hall’s future. Attendees expressed strong agreement.

Whitney Hall is part of a larger economic picture. Re-opening of the Country Store is tied to other economic activity, especially with respect to Whitney Hall. Together, and with cultivation of nearby tourist assets, [saving the Country Store and Whitney Hall] may be possible. Without the store and without Whitney Hall, the village would lose its character and the Town would lose its only opportunity to have space for community gathering.

It is hard to know ... the right answer without a comprehensive plan for the future of South Royalston Whatever the answer is for Whitney Hall, I hope it supports the future of a South Royalston where economic development can occur.

10. Summary of Appendices and Annex

Market Analysis

Keen Independent analyzed demographics, spending potential, market potential and other characteristics of the population of the established Whitney Hall market areas and compared these trends to national averages. We also mapped similar community assets and studied population projections for the area. This market analysis is included as Appendix A.

Challenges

Factors in the surrounding community and in Royalston as a whole impact the feasibility of possible future purposes for Whitney Hall. The study team analyzed these factors and describes them in Appendix B.

Community Input

Keen Independent engaged the Royalston community through a number of methods. In Appendix C, we provide an analysis of input received through this study process. Methods of engagement included an in-person public meeting, in-depth interviews and a community “virtual workshop” survey that we made available from mid-June to mid-September.

Case Studies

In Appendix D, Keen Independent presents profiles of relevant case studies for Royalston’s Whitney Hall. These case studies were sourced primarily from suggestions from Royalston community members.

Options and Potential Funding Sources

In Appendix E, Keen Independent provides a synthesis of options for the future of Whitney Hall. Keen Independent also analyzed potential funding sources for Whitney Hall and discusses considerations and barriers for each in Appendix E.

Building Condition Assessment

Keen Independent Research engaged Trahan Architects to provide a site assessment report for Whitney Hall located in Royalston, MA. The site assessment took place on Monday June 12th, 2023. The site assessment’s primary scope was to review existing fire/life safety, mechanical, electrical, and plumbing systems and provide an overview of structural and envelope building components. Annex A is the full site assessment report.

APPENDIX A. Town of Royalston Market Analysis — Introduction

Keen Independent presents a market analysis including demographics of relevant market areas, an inventory of community assets in the Town of Royalston and analysis of businesses in the Royalston and surrounding area to inform the Whitney Hall feasibility study.

Methodology

As part of this market analysis, Keen Independent developed four market areas based on drive time to Whitney Hall. Those market areas are as follows:

- Primary market area (within about 10 minutes of driving);
- Secondary market area (within about 20 minutes of driving);
- Tertiary market area (within about 40 minutes of driving); and
- Regional market area (within about 60 minutes of driving).

Keen Independent gathered demographic, spending and market potential information about the population within each of the market areas. The study team also provides Royalston's population data and forecasts from the University of Massachusetts Donahue Institute Population Estimates Program. Population information includes overall population size projections and current and forecasted age distribution.

Additionally, the study team inventoried relevant community assets in the Town of Royalston and categories of businesses in Royalston and the surrounding area.

A-1. Village of South Royalston

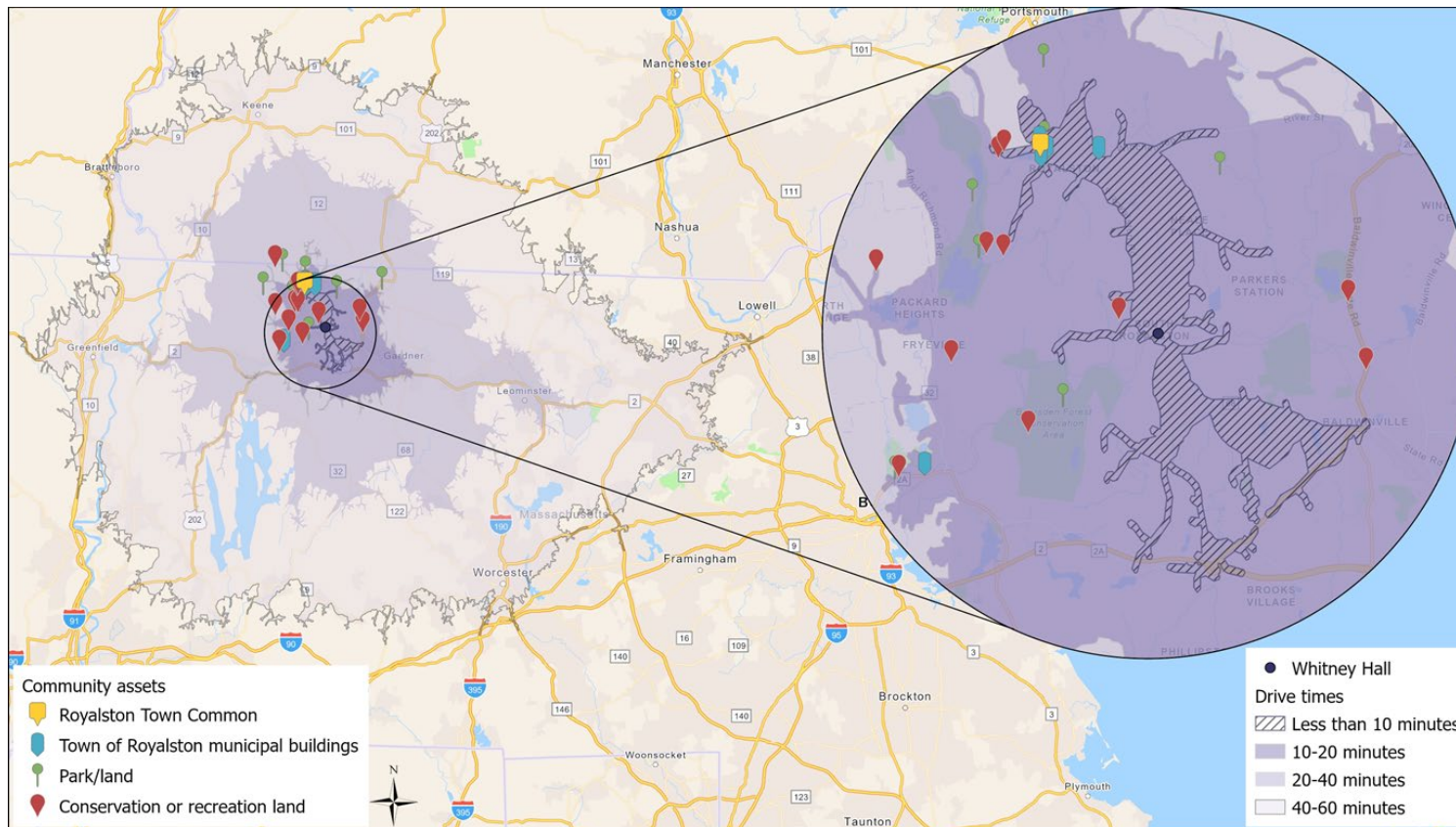


Source: Keen Independent Research.

A. Market Analysis — Market area map

In Figure A-2 below, Keen Independent presents a market area map for Whitney Hall displaying assets such as public buildings, parks and conservation land near Whitney Hall.

A-2. Community assets near Whitney Hall



Note: The market area closest to Whitney Hall by drive time (less than 10 minutes) is the irregularly shaped area indicated with diagonal hatching at the center of the inset map. Additional market areas range from the darkest shade of purple without hatching, a 10 to 20 minute drive to Whitney Hall and a light purple for the area that is a 20 to 40 minute drive. The market area that is a 40 to 60 minute drive is indicated by the lightest shade of purple and extends on the West and North sides to Greenfield, Brattleboro and Keene and on the Southeast side to Worcester.

Source: Esri, NASA, NGA, County and City of Denver, HERE, Garmin, SafeGraph, METI/NASA, USGS, SafeGraph, EPA, NPS, USDA, Keen Independent Research.

A. Market Analysis — Demographics

Keen Independent analyzed the population and consumer behaviors in the primary, secondary, tertiary and regional market areas for the Town of Royalston.

Population Characteristics

Figure A-3 displays income and education for the relevant market areas compared to the United States overall.

Income. Primary and regional market areas have higher median incomes than the secondary and tertiary market areas. The primary and regional median incomes are also higher than the national average.

Education. The populations in the Royalston market areas are less likely to have college or graduate degrees than the national average.

A-3. Household income and education for Royalston's market areas, 2022

	Primary market	Secondary market	Tertiary market	Regional market	United States
Total households	329	14,036	77,706	329,880	128,586,317
Household income					
\$24,999 or less	10.0 %	14.7 %	14.7 %	14.6 %	15.8 %
\$25,000 to \$49,999	15.5	20.3	18.4	16.4	18.6
\$50,000 to \$74,999	15.5	16.9	16.3	15.0	16.9
\$75,000 to \$99,999	19.8	15.6	14.7	12.7	13.2
\$100,000 to \$199,999	34.7	28.1	29.0	29.7	25.6
\$200,000 or more	4.6	4.4	7.0	11.7	9.9
Total	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %
Median household income	\$ 84,249	\$ 71,218	\$ 75,848	\$ 81,506	\$ 72,406
Education (age 25+)					
Less than high school	6.4 %	7.7 %	8.3 %	7.4 %	10.1 %
High school	38.5	35.5	33.6	27.0	27.1
Some college	32.2	35.0	29.7	24.9	27.7
Bachelor's degree	13.7	14.4	18.0	22.8	21.7
Graduate degree	9.3	7.3	10.4	17.9	13.4
Total	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %

Source: U.S. Census Bureau American Community Survey, 2022.

A. Market Analysis — Demographics

Figure A-4 displays age, race/ethnicity and disability status for the relevant market areas compared to the United States overall.

Age. The population of Royalston’s market areas is older on average than the national average. The primary market area is substantially older, more than six years above the national average.

Race/ethnicity. The population in the primary market area is substantially more likely to identify as non-Hispanic and white than is true in the United States overall. The populations of the secondary, tertiary and regional market areas are somewhat more diverse than the primary market but are also substantially less diverse in terms of race and ethnicity than the United States overall.

Disability status. The rate of households that include persons with disabilities in the regional market is comparable to the rate nationally. The rates of persons with disabilities are slightly higher in the secondary and tertiary markets than the national average. The rate of persons with disabilities is slightly lower in the primary market area than in outlying market areas and the U.S. overall.

A-4. Age, race/ethnicity and disability status in Royalston market areas, 2022

	Primary market	Secondary market	Tertiary market	Regional market	United States
Total population	885	34,369	196,803	854,401	335,541,003
Age					
Up to 10 years old	9.4 %	10.2 %	10.7 %	10.0 %	11.9 %
10 to 19 years old	11.0	11.0	12.1	13.3	12.5
20 to 29 years old	11.5	12.8	12.7	14.2	13.5
30 to 39 years old	10.6	12.5	12.8	12.1	13.6
40 to 54 years old	21.0	19.6	19.1	18.4	18.2
55 to 69 years old	24.8	21.0	20.6	19.9	18.5
70 or more years old	12.0	12.9	12.1	12.0	11.8
Total	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %
Median age	46.7	43.0	41.5	40.3	38.9
Race					
African American	0.7 %	1.7 %	3.8 %	5.5 %	12.4 %
Asian American	0.5	1.2	2.1	5.5	6.1
Native American	0.1	0.2	0.3	0.3	1.1
Pacific Islander	0.0	0.0	0.0	0.0	0.2
Other race	1.1	2.6	6.1	5.7	8.6
Two or more races	4.9	6.9	9.3	8.8	10.6
White	92.8	87.3	78.5	74.2	61.0
Total	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %
Ethnicity (of any race)					
Hispanic American	3.2 %	6.8 %	13.2 %	11.9 %	19.0 %
Non-Hispanic	96.8	93.2	86.8	88.1	81.0
Total	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %
Households with 1+ person with a disability					
Average	22.3 %	28.4 %	27.2 %	25.4 %	25.6 %

Source: U.S. Census Bureau American Community Survey, 2022.

A. Market Analysis — Demographics

Housing. The rates of housing vacancy in the Royalston market areas are comparable to the rate in the United States overall. At 9 percent vacancy for homes and rental units, Royalston is within a “healthy” range where supply is expected to be adequate for demand.¹

¹ Vacancy rates that are too low indicate demand is exceeding supply and that a community may have a housing shortage. According to a recent synthesis of economic literature produced by The Boston Foundation, “A healthy vacancy rate is when the market has enough inventory to account for the natural mobility of households.” The report goes on to indicate that, “A healthy vacancy rate is often considered to be two percent for home ownership and six percent for rentals, by industry standards.” By

A-5. Housing vacancy in Royalston’s market areas

	Primary market	Secondary market	Tertiary market	Regional market	United States
Vacant housing units					
Total	31	1,483	6,969	24,509	14,227,242
Average	9 %	10 %	8 %	7 %	10 %

Source: U.S. Census Bureau American Community Survey, 2022

either benchmark, Royalston’s vacancy rate would be considered sufficient to meet demand. (See The Greater Boston Housing Report Card, 2021, Chapter 3 at <https://www.tbf.org/news-and-insights/reports/2021/jun/greater-boston-housing-report-card-2021/gbhrc2021-chapter-3#:~:text=By%202019%2C%20the%20homeownership%20vacancy,two%20and%20six%20percent%20benchmarks.>)

A. Market Analysis — Demographics

Spending and Market Potential Indicators

Assessing consumer behavior in the Town of Royalston can help inform the feasibility of potential uses for Whitney Hall. Figures A-6 through A-9 illustrate spending potential indices (SPI) and market potential indices (MPI) of Royalston's market areas in several categories that may be relevant to the future of Whitney Hall.

The SPI compares the average amount spent locally for a product or service to the average amount spent nationally. An index of 100 reflects the national average; an SPI of 70, for example, indicates that average spending by local consumers is 30 percent below the national average.

MPI measures the relative likelihood of adults in the specified area exhibiting certain behavior or purchasing patterns. An MPI of 100 represents the U.S. average.

A. Market Analysis — Demographics

Spending potential. The study team selected several spending potential indicators as shown in Figure A-6. The Town of Royalston had not, at the time of this analysis, narrowed the future potential uses for Whitney Hall, so the focus here on a collection of arts, culture and enrichment related indicators is illustrative of one potential focus for Whitney Hall's future.² The team also included data on cash gifts to charities to understand the potential of fundraising within the Royalston area to support Whitney Hall's revitalization.

We note that the primary market has the highest median income of Royalston's market areas as previously shown in Figure A-3. The regional market is a close second on median income. However, the regional market, though close in income to the primary market, spends substantially more in every category. This may reflect that opportunities are more abundant in the regional market than in the primary market.

In a primary market where the population numbers are small, spending potential in the secondary market may be critical to the viability of certain ventures. For example, a small primary market with high spending potential indicators combined with a secondary market that also demonstrates high spending may bode well for the economic feasibility of a new venture. In this case, a small primary market demonstrates average spending, and the tertiary market is substantially below the national average. These conditions may not bode well for the feasibility of a new arts, culture or enrichment endeavor if it must be sustained financially primarily through consumer spending.

A-6. SPI for certain types of entertainment spending by the Town of Royalston market area, 2022

	Primary market	Secondary market	Tertiary market	Regional market	United States
Entertainment/recreation					
<i>Index</i>	94	86	93	108	100
Average	\$ 3460	\$ 3,141	\$ 3,429	\$ 3,949	\$ 3,698
Entertainment/recreation fees/admissions					
<i>Index</i>	97	87	96	113	100
Average	\$ 814	\$ 734	\$ 811	\$ 951	\$ 825
Tickets to theater/operas/concerts					
<i>Index</i>	99	90	99	117	100
Average	\$ 91	\$ 83	\$ 91	\$ 107	\$ 90
Tickets to movies					
<i>Index</i>	100	84	92	108	100
Average	\$ 48	\$ 53	\$ 58	\$ 68	\$ 63
Live entertainment-catered affairs					
<i>Index</i>	97	88	98	118	100
Average	\$ 14	\$ 13	\$ 14	\$ 17	\$ 100
Cash gifts to charities					
<i>Index</i>	104	86	96	113	100
Average	\$ 390	\$ 324	\$ 363	\$ 428	\$ 365

Source: Esri's U.S. Consumer spending data based on the Consumer Expenditure Survey (CEX) from the U.S. Bureau of Labor Statistics, U.S.

² Market potential indicators on subsequent pages consider additional categories.

A. Market Analysis — Demographics

Market potential. Figures A-7 through A-9- display the percentage of the market area population participating in each activity and the index relative to the national average. The study team clustered market potential indicators into three categories relevant to potential future uses of Whitney Hall:

- Outdoor recreation;
- Civic and philanthropic engagement; and
- Arts, culture, enrichment and dining.

Outdoor recreation market potential. The populations in Royalston’s market areas participate in outdoor recreation at or substantially above the national average (with the sole exception of fishing in the regional market, which was close to, but slightly below, the U.S. average).

The primary market was substantially more likely than the other market areas and the United States average to engage in several outdoor activities evaluated by the study team including:

- Birdwatching (39% higher than the national average);
- Canoeing/kayaking (34% higher);
- Fishing (31% higher); and
- Hiking (22% higher).

As noted in Figure A-8, residents in the primary market are also 23 percent more likely to support environmental organizations with charitable contributions than the national average.

These indicators demonstrate a strong inclination toward outdoor pursuits and the potential for the Town of Royalston to position itself as having abundant outdoor opportunities and a community of outdoor enthusiasts.

A-7. Outdoor recreation market potential indices over a 12-month period, 2022

	Primary market	Secondary market	Tertiary market	Regional market	United States
Have a ...					
Garden	43 %	40 %	41 %	40 %	38 %
<i>Index</i>	<i>114</i>	<i>107</i>	<i>108</i>	<i>107</i>	<i>100</i>
Participated in...					
Birdwatching	8 %	7 %	7 %	7 %	6 %
<i>Index</i>	<i>139</i>	<i>112</i>	<i>116</i>	<i>114</i>	<i>100</i>
Canoeing or kayaking	10 %	8 %	8 %	8 %	7 %
<i>Index</i>	<i>134</i>	<i>116</i>	<i>115</i>	<i>112</i>	<i>100</i>
Fishing	14 %	12 %	12 %	10 %	11 %
<i>Index</i>	<i>131</i>	<i>109</i>	<i>109</i>	<i>96</i>	<i>100</i>
Hiking	20 %	16 %	17 %	18 %	16 %
<i>Index</i>	<i>122</i>	<i>101</i>	<i>104</i>	<i>110</i>	<i>100</i>

Source: Esri market potential database based on MRI Simmons Survey (2022)

A. Market Analysis — Demographics

Civic and philanthropic engagement market potential. People in the primary market area were more likely than the national average to contribute to every type of organization. The primary market also shows strong inclination toward civic engagement through attendance at public meetings.

Civic and philanthropic engagement indicators across Royalston's secondary, tertiary and regional markets also tend to exceed the national average. The exceptions to this tendency are in the secondary and tertiary markets where contributions in some categories are about on par with the national average. In one category, contributions related to political causes in the secondary market, contributions were below slightly below the U.S. average.

A-8. Civic and philanthropic engagement market potential indices over a 12-month period, 2022

	Primary market	Secondary market	Tertiary market	Regional market	United States
Attended a...					
Public meeting on town or school affairs	11 %	9 %	9 %	10 %	9 %
<i>Index</i>	127	105	107	116	100
Contributed to organization focused on...					
Arts or culture	5 %	5 %	5 %	6 %	5 %
<i>Index</i>	110	108	107	120	100
Education	10 %	9 %	9 %	10 %	9 %
<i>Index</i>	109	99	101	111	100
Environment	7 %	6 %	6 %	7 %	6 %
<i>Index</i>	123	101	104	118	100
Health	9 %	8 %	8 %	9 %	8 %
<i>Index</i>	110	100	101	112	100
Political issues	9 %	8 %	9 %	9 %	8 %
<i>Index</i>	110	94	102	109	100
Social services	12 %	10 %	10 %	11 %	10 %
<i>Index</i>	126	104	107	114	100

Source: Esri market potential database based on MRI Simmons Survey (2022)

A. Market Analysis — Demographics

Arts, culture, enrichment and dining market potential. Populations in Royalston’s immediate market areas demonstrate higher than average participation in a variety of arts, enrichment and entertainment activities. For example, the population in Royalston’s primary market is more likely than the national average to dine out, attend country or rock music performances and attend movies. These results are notable and reflect both inclination and willingness to travel for these experiences given that there are no facilities in Royalston offering such programs or opportunities.

The population in the primary market is less likely than the national average to have been dancing, attended classical, opera, or dance performances or participated in adult education courses.

A-9. Market potential indices by market area over a 12-month period, 2022

	Primary market	Secondary market	Tertiary market	Regional market	United States
Did painting/drawing/sculpting	10 %	11 %	11 %	11 %	10 %
<i>Index</i>	99	106	105	107	100
Dined out	54 %	52 %	52 %	53 %	51 %
<i>Index</i>	107	103	102	105	100
Went to a museum	13 %	13 %	13 %	14 %	13 %
<i>Index</i>	102	104	102	112	100
Went to a live theater	10 %	10 %	10 %	11 %	10 %
<i>Index</i>	100	99	98	114	100
Went dancing	7 %	7 %	7 %	8 %	8 %
<i>Index</i>	82	89	91	102	100
Attended a(n)...					
Adult education course	8 %	9 %	9 %	10 %	10 %
<i>Index</i>	86	88	90	104	100
Opera/classical show	3 %	3 %	3 %	3 %	3 %
<i>Index</i>	87	81	84	101	100
Country music show	6 %	5 %	5 %	5 %	5 %
<i>Index</i>	116	103	103	104	100
Dance performance	2 %	3 %	3 %	3 %	3 %
<i>Index</i>	71	87	89	103	100
Movie (in last 6 months)	48 %	47 %	47 %	50 %	48 %
<i>Index</i>	110	98	99	104	100
Rock music show	9 %	9 %	9 %	9 %	8 %
<i>Index</i>	110	113	108	113	100

Source: Esri market potential database based on MRI Simmons Survey (2022)

A. Market Analysis — Population projections

Methodology

Keen Independent examined population forecasts developed by the UMass Donahue Institute Population Estimates Program. The Town of Royalston is projected to decline in population in the coming decades.

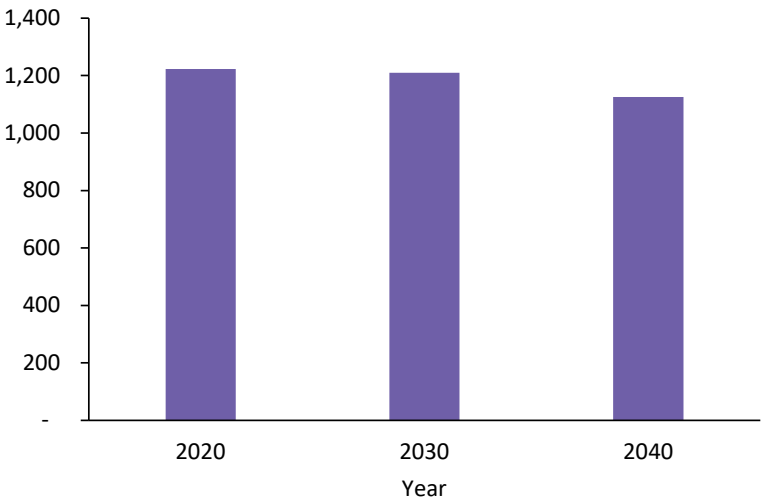
Population forecasts. The UMass Donahue Institute Population Estimates Program forecasts the Town of Royalston population will decline about 7 percent in total residents from about 1,200 in 2020 to about 1,100 in 2040 (see Figure A-10). According to these data, the Town of Royalston population is expected to decrease at a rate of about 0.4 percent annually.

Limitations of population projection data. Official state demographic forecasts are the best data source available for understanding expected population trends but have some limitations. UMass Donahue Institute Population Estimates Program acknowledges that “projections for small geographies and distant futures will be less predictive than projections for larger populations and near terms.” Forecasts are based on broad assumptions and data sources used statewide, such as the U.S. Census and American Community Survey about births, deaths, housing and other factors. Changes in specific community circumstances would not have been anticipated as part of these forecasts.

For example, the potential impact of broadband, installed in September 2023, on Royalston’s population is not accounted for in the Donohue Institute forecasts. Research suggests that high speed internet access in rural American is linked to population growth and positive economic impacts.³

However, the potential impact of broadband on population growth is subject to a variety of factors that make it difficult to predict. Reasonable assumptions could range from broadband stabilizing an otherwise declining population to contributing to modest growth. On a small population base, modest growth will not result in a dramatic change in the number of residents, nor see a significant change in demand for services or revenues generated in property taxes, for example. For these reasons, the study team suggests that the Donohue Institute forecasts are an appropriate basis for planning despite specific community circumstances that could cause actual population changes to deviate from forecasts.

A-10. UMass Donahue Institute Population Estimates Program



Source: Umass Donahue Institute Population Estimates Program, Keen Independent Research.

³ Marre.A, “Bringing broadband to rural America” in *Community Scope* (December 2020).

https://www.richmondfed.org/publications/community_development/community_scope/2020/comm_scope_vol8_no1

A. Market Analysis — Population projections

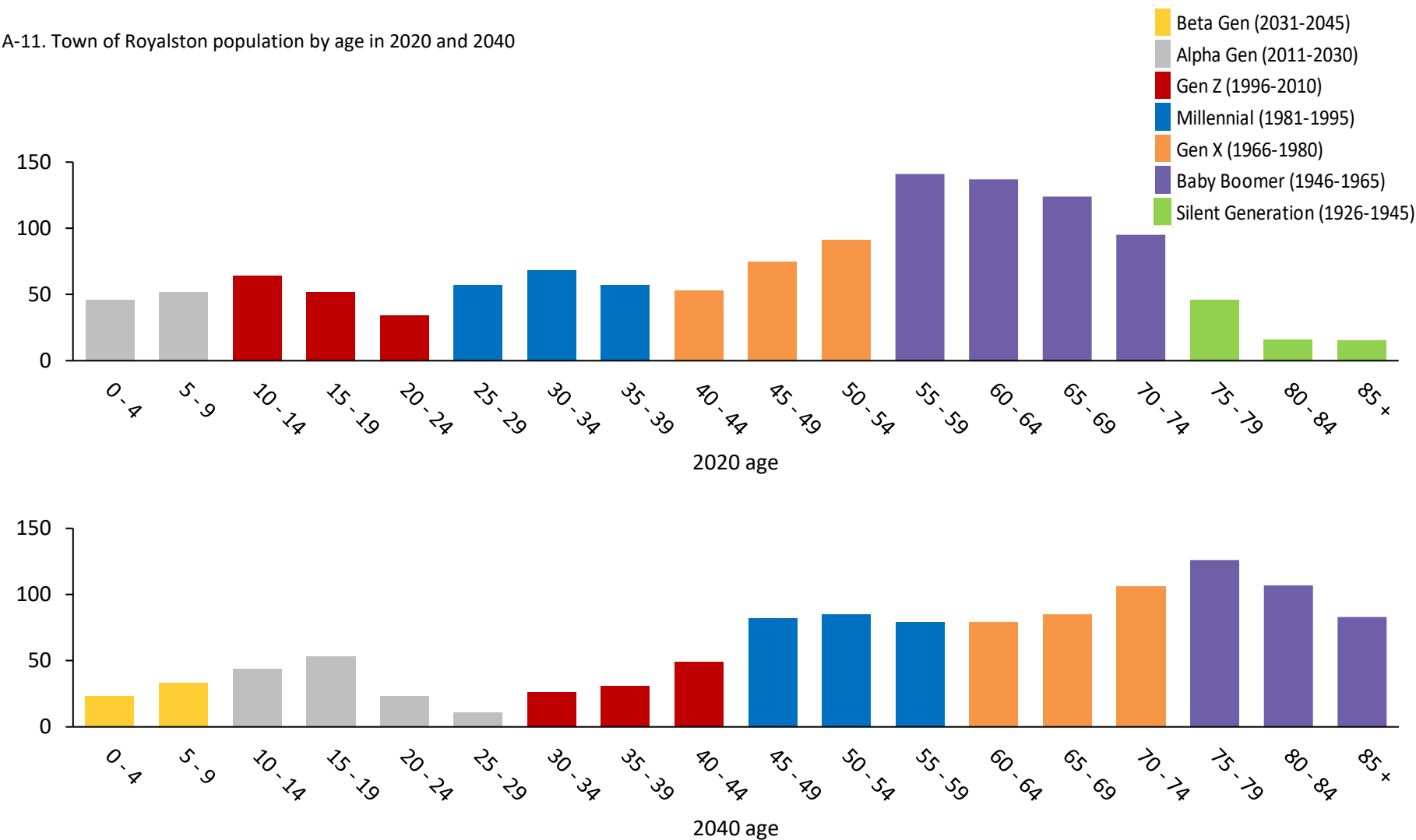
The Town of Royalston's population is projected to age over time. Demand for different types of businesses, services, activities or events tends to vary by age group, so understanding projected population changes can help the Town of Royalston consider what types of opportunities and services may be in demand over time.

Population by age in 2020. The age profile of local residents also affects demand for potential uses of Whitney Hall. Figure A-11 on the following page illustrates the age distribution of the Town of Royalston population. The graph shows the population grouped according to widely recognized generations beginning with the Silent Generation (born between 1926 and 1945) to Gen Z (born between 1996 and 2010) and the Alpha Generation (born in 2011 and later years).

Population by age in 2040. Figure A-11 also presents the projected age distribution for the Town of Royalston population in 2040 based on the UMass Donahue Institute Population Estimates Program projections for the area. Note that Keen Independent shows a cohort of people who will be born between 2031 and 2045 as "Beta Gen" (name invented to follow the "Alpha Gen" generation now being born).

A. Market Analysis — Population projections

A-11. Town of Royalston population by age in 2020 and 2040



Source: UMass Donahue Institute Population Estimates Program

A. Market Analysis — Environmental scan and inventory

Community Asset Inventory

In Figure A-12, we display the inventory of community assets such as public buildings, parks and recreation areas in Royalston and the surrounding area.

Public buildings listed are limited to those located in Royalston. Outdoor recreation assets listed are located within about a 20-minute drive of Royalston. Columns on the right provide distances to Whitney Hall and Royalston's Town Common, the approximate geographic center of the Town of Royalston.

A-12. Inventory of community assets in the Royalston area

Name	Location	Type	Distance from Whitney Hall	Distance from Town Common
Whitney Hall	Royalston	Municipal or public building	0	4.2
Department of Public Works	Royalston	Municipal or public building	3.6	1.2
Raymond School	Royalston	Municipal or public building	4.1	0.1
Phinehas S Newton Library	Royalston	Municipal or public building	4.4	0.1
Royalston Fire Station	Royalston	Municipal or public building	4.4	0.2
United States Postal Service	Royalston	Municipal or public building	4.4	0.2
Jacobs Hill	Royalston	Conservation/recreation land or trail	5.0	0.8
Spirit Falls Trailhead	Royalston	Conservation/recreation land or trail	5.0	0.8
Doane's Falls Reservation	Royalston	Conservation/recreation land or trail	6.2	2.0
Doane's Falls / Tully Lake Trailhead	Royalston	Conservation/recreation land or trail	6.5	2.3
Skyfields Arboretum	Athol	Conservation/recreation land or trail	9.1	4.9
Bearsden Conservation Area	Athol	Conservation/recreation land or trail	9.5	8.7
Millers River Environmental Center	Athol	Conservation/recreation land or trail	9.7	7.2
Tully Trail	Orange	Conservation/recreation land or trail	9.8	5.6
Birch Hill Wildlife Management Area	Royalston	Park	3.0	3.2
Bullock Park	Royalston	Park	4.4	0.2
Royalston Common Historic District	Royalston	Park	4.5	0
Lawrence Brook Wildlife Management Area	Royalston	Park	5.9	1.7
Long Pond Wildlife Management Area	Royalston	Park	7.9	3.7
Royalston State Forest	Royalston	Park	8.0	3.8
Alan E. Rich Environmental Park	Athol	Park	9.7	7.1
Winchendon Community Park	Winchendon	Park	10.8	9.0
Fish Brook Wildlife Management Area	Royalston	Park	11.0	6.8
New England's Guide Service LLC.	Royalston	Outdoor recreation	0.7	4.0
Tully Lake Campground	Royalston	Outdoor recreation	6.7	2.5
Otter River State Forest	Baldwinville	Outdoor recreation	6.7	10.4
Lake Dennison Recreation Area	Winchendon	Outdoor recreation	8.0	9.1

Source: Keen Independent Research.

A. Market Analysis — Environmental scan and inventory

Business and Organization Inventory

The study team inventoried businesses and organizations by type within a 15-mile radius of Royalston. In selecting categories potentially relevant to the project, the study team considered:

- Categories related to suggestions community members offered for future uses of Whitney Hall;
- Categories where the presence of businesses might create competition for certain ideas suggested for Whitney Hall; and
- Categories where the absence of businesses in the local area might be relevant.
 - Absence of businesses in certain categories might indicate unmet community needs.
 - Absences might also reveal a lack of existing consumer activity (a built-in customer base) that could make attracting new businesses or investors more difficult.

Methodology. The study team pulled data for the identified business categories using Dun and Bradstreet's industry/organization type codes and analyzed counts by business type and distance to Royalston's geographic center.

The team defined Royalston's center based on distance from Royalston's boundaries (located approximately at the Town Common). The data in Figures A-13 are best considered an overall impression of the availability and types of businesses in and near Royalston.

Summary of findings. There are few businesses in the categories examined that are centrally located to Royalston's center (Figure A-13).

Recreation. Royalston is home to one recreation related organization within one mile of Royalston and 13 less than five miles to Royalston.

Arts, culture and education. The inventory shows no organizations in these categories within a one-mile radius and just one within five miles.

Dining, shopping and hospitality. There are no organizations in these categories within one mile and five organizations within five miles.

A. Market Analysis — Environmental scan and inventory

A-13. Inventory of organizations and businesses in the Royalston area by type and distance

	Less than one mile	Between 1 and 4.9 miles	Between 5 and 9.9 miles	Between 10 and 15 miles	Total businesses
Recreation	1	13	123	153	350
Arts, culture and education	0	1	38	57	96
Dining, shopping and hospitality	<u>0</u>	<u>5</u>	<u>151</u>	<u>222</u>	<u>378</u>
Total	1	19	312	432	824

Source: Dun & Bradstreet, Keen Independent Research.

APPENDIX B. Challenges — Introduction

The Town of Royalston is considering options for the future of Whitney Hall, a historic building located in South Royalston Village. Factors in the surrounding community and in Royalston as a whole impact the feasibility of possible future purposes for Whitney Hall. This appendix provides a brief synthesis of community circumstances that are intertwined with the feasibility assessment for Whitney Hall.

This synthesis draws on:

- Observations during the study team’s site visit in June 2023;
- Background research including review of Select Board meeting minutes, the Town’s website and local news sources; and
- Interviews and small group discussions with community members, Town leaders and regional planning contacts.

Discussion in this appendix includes:

- Community services and amenities;
- Outdoor recreation access;
- Municipal assets that compete for resources in Royalston such as Town Hall pictured in Figure B-1; and
- Zoning restrictions.

B.1 Town Hall, one of Royalston’s municipal assets



Source: [John Phelan](#)
License: [Creative Commons Attribution](#)

B. Challenges — Community context

Consumer Services and Amenities

South Royalston has Town water and sewer, an asset and potential selling point for Whitney Hall. However, lack of outlets for food and beverage, groceries or basic supplies and other services are potential barriers to developers, telecommuters who might seek to locate to more rural and more affordable community and to tourism. The Town of Royalston has no consumer-facing businesses or services.

- The Town's only restaurant, Pete and Henry's, a fixture in South Royalston Village since 1946, burned down in 2018. In 2021 the Town purchased the vacant lot, adjacent to Millers River, for \$5,000 so it might be repurposed to support outdoor recreation and tourism or other purposes in the future.¹
- Residents report that the Town's Country Store, located in South Royalston, became less reliable in meeting their needs after it changed hands in 2019. The store closed in March 2023.² The store remains shuttered and is currently for sale. Town residents have collaborated to try to find a solution for 'saving' the store but as of the time of this report, have been unsuccessful so far.
- Town Hall, the library and the Post Office are located at or near the Town Common, about four miles away. The South Royalston branch post office closed decades ago.
- Until September 2023, the Town lacked broadband access.

¹ Vine, G. (2021, September 21). Cloutiers sign Pete and Henry's property over to Town of Royalston. *Athol Daily News*. <https://www.atholdailynews.com/Cloutiers-sign-Pete-and-Henry-s-property-over-to-Royalston-42645965>

B-2. Royalston General Store



Source: Keen Independent Research.

² Vine, G. (2023, March 24). Royalston Country Store closes its doors. *Athol Daily News*. <https://www.atholdailynews.com/Country-Store-closes-its-doors-50388957>

B. Challenges — Community context

Outdoor Recreation

- King Street Bridge, a key access point from Royalston to outdoor assets, was recently ordered closed by the Massachusetts Department of Transportation. The bridge, across the road from Whitney Hall, spans Millers River. The bridge had been closed to vehicular traffic for decades but had continued to provide direct access for pedestrians and cyclists from South Royalston to the trailhead of a three-mile path along Millers River and into Bearsden Conservation Area in Athol. In October 2022, the bridge was deemed unsafe even for foot traffic and was closed to all users.³
- Royalston is home to attractive outdoor areas including three properties owned and managed by The Trustees of Reservations featuring waterfalls and hiking trails, four state wildlife management areas and a state forest. There is no signage communicating the natural features as attractions or wayfinding from one to the next.

B-3. Millers River/Baqua River Trail Map Showing trailhead access from King Street Bridge



Source: Keen Independent Research

³ Vine, G. (2023, July 20). Selectboard mulls King Street Bridge's future. *Athol Daily News*. <https://www.atholdailynews.com/Selectboard-mulls-King-Street-Bridge-s-future-51694195>

B. Challenges — Community context

- Large concrete structures, remnants from a train bridge that no longer exist, dot Millers River in the area near South Royalston, posing safety issues for water-based recreation unless mitigated. Some interviewees reported that the Army Corps of Engineers is responsible for the structures.
- Royalston lacks amenities to support outdoor recreation users such as public restrooms, designated parking or places to rent equipment. The community also has limited resources to meet increased needs for services such as trash removal, parking enforcement and emergency assistance that may accompany increased outdoor tourism.⁴
- Royalston is not currently prepared to mitigate or prevent the negative impacts of increased outdoor tourism. Without any consumer-facing businesses, such as a store, restaurant or even a gas station, the Town is also not currently prepared to benefit economically from increased tourism.

B-4. Millers River, near Whitney Hall



Source: Keen Independent Research.

⁴ During the height of COVID-19, Royalston's waterfalls and hiking trails drew visitors seeking new outdoor opportunities. Residents report that unmanaged tourism came

with negative impacts and left some Town members hesitant about strategies to increase tourism to the area in the future.

B. Challenges — Community context

Competing Demands

Royalston has an inventory of multiple municipal assets that require investment and compete for limited taxpayer and other resources. These include:

- **Town Hall.** A recent elevator addition at the rear of Royalston's Town Hall has made the building accessible to those with mobility impairments. Town Hall has also received energy efficient lighting upgrades. However, the building dates to 1867 and should be expected to have continued maintenance and repair needs.
- **Phinehas S. Newton Library.** The Town's library is another municipal asset requiring maintenance and repair. The library is inaccessible to patrons with mobility considerations. Local communities that successfully compete for Massachusetts Board of Library Commissioner building grants are able to share renovation or rebuild costs with the state. Otherwise, library building costs are the responsibility of the Town.
- **Raymond School.** Built in 1938, The Raymond School building is currently closed. The Select Board approved a plan to repair and repurpose the building to provide modern offices for Town employees. Substantial repairs have been completed. The Town is exploring options to complete an architectural study and develop a detailed plan. Funding for completion of this project has not been secured.
- **Historic hearse houses.** Two historic hearse houses, one at Olde Centre Cemetery and one at Riverside Cemetery, are targeted for possible repairs to be usable for Town storage.

B-5 Phinehas S. Newton Library



Source: Phinehas S. Newton Library, Royalston.

B. Challenges — Community context

- **1 School Street lot.** The Town owns 1 School Street, near Whitney Hall (5 School Street). The lot has been vacant since the Town demolished the building on it in 2018. Some community members have raised the possibility of packaging 1 School Street with Whitney Hall to create a more attractive opportunity for a prospective developer. However, the assets are not adjacent, but instead are separated by the Second Congregational Church.
- **The old fire station.** The old fire station, which is primarily used for storage, is owned by the Town. The lot on which the building sits is owned by the First Congregational Church. The Church has advised the Town that the building requires repairs.
- **Pete and Henry's lot.** As previously noted, the Town purchased the lot that had been home to the Town's only restaurant before it burned down. The Town used funds under the Community Preservation Act to fund the purchase and must fund expenses related to a required Conservation Restriction.⁵ The Town may eventually invest to turn the lot into a park.

- **King Street Bridge and South Royalston sewer.** As noted previously, King Street Bridge, which is pivotal to accessing attractive outdoor recreation opportunities from South Royalston, is closed due to unsafe conditions. The bridge is owned by the Town. The South Royalston sewer line runs under the bridge and according to interviewees, Town water and sewer, assets that are unusual among rural communities in this part of Massachusetts, may be jeopardized if the bridge condition continues to decline.

- B-6. King Street Bridge



Source: Keen Independent Research

⁵ Conservation restrictions are legal agreements that limit development and other activities on natural and recreational resources. Conservation restrictions are required on all properties purchased with Community Preservation Act funds in Massachusetts

and must be approved by the state's Executive Office of Energy and Environmental Affairs and filed at the Registry of Deeds. See <https://www.communitypreservation.org/conservation-restrictions>

B. Challenges — Community context

Zoning

Restrictive zoning in South Royalston limits current options for development and may impact potential future purposes for Whitney Hall.

Restrictions in current zoning reported by current residents and town leaders that may create challenges in South Royalston and related to Whitney Hall include:

- Current zoning that allows for residential and agriculture uses only;
- Limited business uses via grandparenting (e.g., the Country Store and former restaurant were allowed due to uses established before current zoning restrictions, but when the restaurant burned down, only the original owners could have rebuilt the restaurant under existing zoning and had only two years to do so); and
- Acreage requirements per unit that inhibit development of smaller lots or multi-family housing options.

Town members are unclear whether Whitney Hall's history as a school or dance hall predating current zoning might be a basis for grandparenting educational or recreational purposes in the future.

Zoning overlay. The Town's Planning Board is working with the Montachusett Regional Planning Commission to increase flexibility within South Royalston for economic and business development by creating a proposed "zoning overlay" in South Royalston. The zoning overlay would allow development under existing zoning or, for a limited and newly defined set of purposes, under the overlay zone. Possibilities for the overlay are still under discussion but include allowing service-oriented businesses such as restaurants, bed and breakfasts and barber shops/hair salons as well as senior and multifamily housing.

Planning Board representatives recognize the presence of Town sewer and water in South Royalston and the capacity to connect more structures to that service as a distinct advantage for South Royalston compared to many other rural communities.

APPENDIX C. Community Input — Introduction

Keen Independent gathered input from community members and other stakeholders to inform the Marketing Feasibility Study about the future of Whitney Hall. Research with stakeholders explored ideas and considerations for transforming this historic, but underutilized, South Royalston site into a fully functioning community asset.

Qualitative analysis presented here is organized by topic and integrates results from:

- A community “virtual workshop” survey;
- Interviews and small group discussions;
- A public meeting; and
- Study hotline and email feedback.

Throughout this appendix, sample quotes illustrate themes the study team identified when analyzing stakeholder input about Whitney Hall.

C-1. Millers River, Royalston



Source: Keen Independent Research.

C. Community Input — Methodology and participation

Virtual Workshop Survey

Keen Independent used an online survey to gather community input about potential purposes for use of Whitney Hall. The survey followed Keen Independent’s “virtual workshop” approach, which emphasizes more open-ended questions than a typical survey instrument and is designed to gather qualitative data. This approach encourages deep, thoughtful responses.

Outreach and promotion. The study team prepared the online survey, which was promoted to residents in the Town’s library newsletter mailed to all residents. In addition, the Town’s project point person emailed the survey link to interested stakeholders, such as those who participated in small groups discussions and a public meeting.

Participation. The survey, which ran from mid-June to mid-September, collected 65 responses. Survey participation varied by question because most questions were optional, and not all participants completed the entire survey. Question-specific total respondents (N) are included for each figure that depicts quantitative results.

Questions. The survey began with questions about participant demographics, Town needs and overall suggestions for potential uses for Whitney Hall.

Survey topics included:

- Sentiment about Royalston and Whitney Hall;
- Community needs;
- Support for Whitney Hall repurposing concepts; and
- Decision-making parameters.

C-2. Virtual workshop landing page

Town of Royalston, Whitney Hall Virtual Workshop



Thank you for your interest in the Town of Royalston Whitney Hall Marketing Feasibility Study.

Whitney Hall is a historic 1905 building. The Town wishes to consider options for transforming this iconic, but underutilized, South Royalston village site into a fully functioning, vibrant community asset.

The study team will identify and evaluate the feasibility of future municipal, for-profit and/or non-profit uses of Whitney Hall taking into account:

- Community needs and wishes;
- Potential economic impacts;
- Building conditions, including needed repairs and updates;
- Capital and operational costs; and
- Funding opportunities.

The following virtual workshop includes multiple choice and open-ended questions and takes about 10 minutes to complete. To ensure candid feedback, comments will be reported in aggregate and will not be attributed to individual participants or associated with identifying details.

Source: Keen Independent Research.

C. Community Input — Methodology and participation

Interviews, Group Discussions and Other Comments

Study team members facilitated interviews and small group discussions with key stakeholders identified by Town leadership.

Stakeholders included:

- Regional legislative and planning commission contacts;
- Royalston South Village Revitalization Committee members;
- South Royalston School Reunion Association members;
- South Royalston residents;
- Town of Royalston commission, committee and board members;
- Town elected and appointed officials; and
- Town employees, including occupants of Whitney Hall offices.

Study team members used interview guides to facilitate semi-structured conversations, meaning that predetermined questions guided the discussion, but interviewers asked follow-up questions and probed when necessary to deepen understanding or to clarify comments.

Most interviews were conducted one-on-one. In some cases, stakeholders were convened in small groups, typically of two to three people for joint interviews. Participants were informed their comments would be used in aggregate and reported without identifying information.

Interview and focus group topics. Interview and focus groups included questions regarding the following topics:

- Vision for Whitney Hall if money was not a barrier;
- Royalston's greatest needs and how Whitney Hall might help meet them;
- Aspirations for Royalston's future in general and for South Royalston in particular;
- Regional, statewide or other efforts that may be relevant to Royalston as it considers the future of Whitney Hall; and
- Relevant examples from other communities.

Study communication portals. The study team hosted a dedicated hotline and study email address to invite comments and questions about the project. Feedback received through those channels is also analyzed as part of this appendix.

Participation. In total, approximately 46 stakeholders provided input related to Whitney Hall via interviews, group discussions and/or submissions to the study communication portals.¹

¹ Some stakeholders participated in more than one group discussion due to holding multiple roles or affiliations.

C. Community Input — Methodology and participation

Public Meeting

Study team members facilitated a public meeting to solicit community input about Whitney Hall in June 2023. The session was held in Town Hall and was promoted in the Town's library newsletter. In addition, the Town's project point person conducted outreach to key stakeholders to encourage participation. The session included a short presentation about the project and activity stations that invited both interactive and anonymous participation as follows:

- **Station 1 Associations.** This activity was designed to gather community sentiment about Whitney Hall by inviting attendees to generate words that came to mind when they think of Whitney Hall. Participants then posted them on the wall, clustering their submissions with related ideas posted by other participants.
- **Station 2 Big Ideas.** At this table, participants responded to the following prompt on sticky notes: *What ideas do you have for future uses of Whitney Hall?* Participants then used stickers to upvote suggestions they liked.
- **Station 3 Reflecting on Change.** This exercise was designed to give participants an opportunity to express feedback anonymously that they may have hesitated to share in front of others. Participants filled out comment cards and placed them in envelopes corresponding to the following prompts:
 - *What are Royalston's greatest needs?*
 - *What absolutely can't change about Whitney Hall?*
 - *What could change about Whitney Hall?*
 - *Decisions about the future of Whitney Hall must prioritize (fill in the blank).*

Participation. Approximately 21 stakeholders provided input during the public meeting.

C-3. Public meeting in Royalston's Town Hall, June 12, 2023



Source: Keen Independent Research.

C. Community Input — Demographics

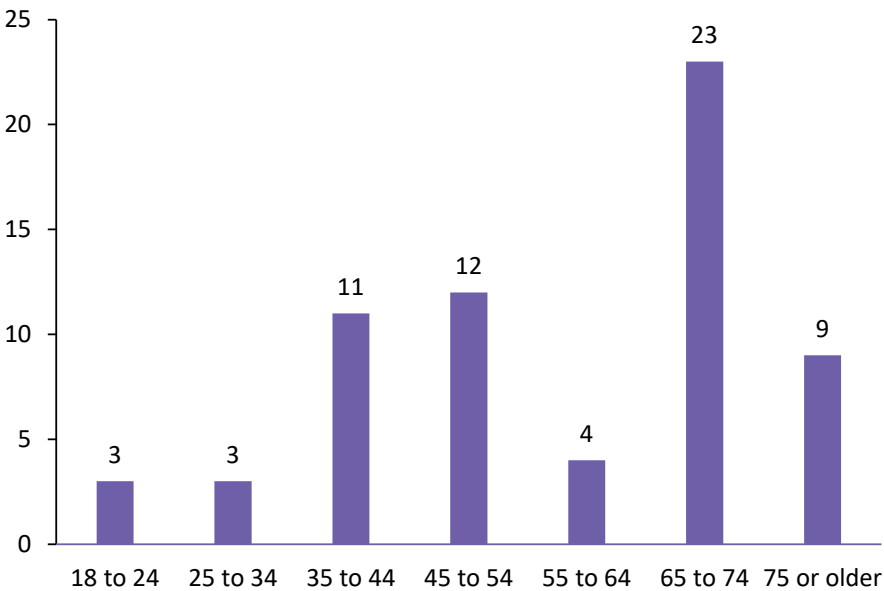
In this section, Keen Independent presents demographic data on virtual workshop survey participants. The virtual workshop was the only method of stakeholder engagement that collected demographic information. Later analysis discusses themes that emerged across the virtual workshop, stakeholder interviews, small group discussions and the public meeting.

Age

More than twice as many survey participants were 45 or older than were under age 45. The largest group of participants reported that they were 65 to 74 years old (about 35%). Figure C-4 shows the age distribution of survey participants.

Participants under age 55. Decisions and actions about Whitney Hall may take time and will likely impact younger residents longer than is true for current residents in older age groups. For this reason, community stakeholders and Town leaders expressed interest in understanding views about Royalston and Whitney Hall by age group. The study team examined responses from participants under age 55 (N= 29). This appendix includes descriptions of notable similarities and differences for participants under age 55 alongside the assessment of overall response on relevant questions.

C-4. Age of survey participants



Note: N = 65.

Source: Keen Independent Research.

C. Community Input — Demographics

Race and Ethnicity

Survey participants were most likely to identify as white (95.4%) and not Hispanic or Latino (96.8%). In terms of race and ethnicity, survey participants were similar to the overall population demographics for Royalston’s primary market area as reported in Appendix A.

C-5. Race and ethnicity of survey participants

Percentage	
Race	
American Indian or Alaskan Native	1.5 %
Asian	1.5
Two or more races	1.5
White	95.4
Total	100.0 %
Ethnicity (of any race)	
Hispanic or Latino	3.2 %
Not Hispanic or Latino	96.8
Total	100.0 %

Note: N = 65 (race); N= 63 (ethnicity). Provided answer choices match categories used in the U.S. census. Those not listed here were not selected by any participants.

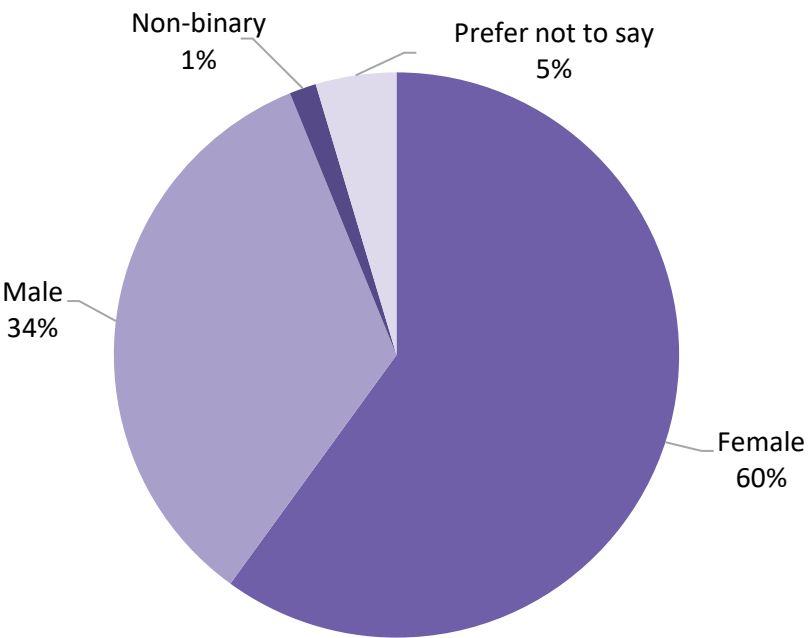
Source: Keen Independent Research.

C. Community Input — Demographics

Gender

Figure C-6 shows how survey participants identified their genders. The majority of participants identified as female (60%).

C-6. Gender of survey participants



Note: N = 65.
Source: Keen Independent Research.

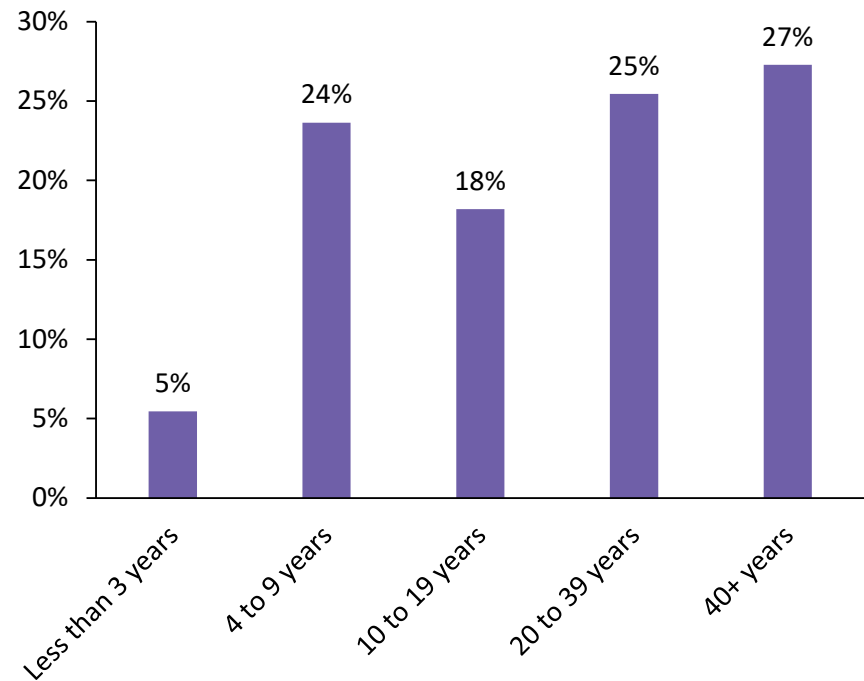
C. Community Input — Demographics

Residents

About 85 percent of survey respondents indicated that they live in Royalston and most have lived in Royalston for 20 or more years. Figure C-7 shows the distribution of response by length of time participants have lived in Royalston. Few participants indicated they had lived in Royalston for less than three years (N = 3).

Non-residents. Those who indicated they do not live in Royalston were asked about their relationship to the town. Responses included previous Royalston residents, current and former Town employees, frequent visitors, non-residents who now reside in neighboring communities and participants who have family members living in Royalston.

C-7. How long survey participants reported they have lived in Royalston



Note: N = 55. Additionally, 10 respondents indicated they do not currently live in Royalston.
Source: Keen Independent Research.

C. Community Input — Connections to Whitney Hall and Royalston

Interest in Whitney Hall

Keen Independent collected information about survey respondents’ reasons for interest in the future of Whitney Hall. Participants most frequently indicated that they are Town residents/taxpayers. The next most frequently selected answers included living near Whitney Hall and attending school in the building.

C-8. Interest in Whitney Hall

	Responses	Percentage
Town resident/taxpayer	51	45 %
Live near Whitney Hall	17	15
Attended school in Whitney Hall	16	14
Member of other community commission, board or committee	11	10
Member of the South Village Revitalization Committee	5	4
Town employee	3	3
Nonprofit group representative	2	2
Business owner	2	2
Other	7	6

Note: N = 63. Percentages total to more than 100 because respondents could select more than one response. Responses total 114.

Source: Keen Independent Research.

C. Community Input — About Royalston

Sentiments about Royalston

Interviewees, group discussion participants and survey respondents commented on what makes Royalston special. Most survey respondents provided responses to this prompt (N = 54). Common themes in the comments are described below and sample comments from participants are provided to the right.

A small, close-knit community. Community stakeholders often reported that they see the Town of Royalston as a “nice quiet town” that has a strong sense of community. Respondents shared that it is a community with “small town charm,” and that they value living and working among people who they have known for years. A few respondents shared that a part of this sense of community is the people who live there who share a deep connection to preserving and taking care of the Town.

Scenic rural landscapes and outdoor recreation opportunities.

Respondents often stated that the Town of Royalston is a “beautiful rural town,” with one-of-a-kind outdoor scenery. They shared that the local farms, waterfalls, hiking trails, woods and the general beauty of Royalston are what make the Town special. Participants also shared that the wildlife makes the Town “picturesque,” with some respondents saying that being surrounded by the natural resources is important to them because of their connections to environmental conservation and outdoor recreation.

I enjoy the small-town vibe. Being able to know many of your neighbors.

This is a close-knit community of hard-working people who care about the town and its future.

So many older residents are original Royalstonians who have remained close friends throughout the years.

... small- town charm and some of the best scenic views

It is a real community. Everyone helps out and works together to make this place an incredible town to call home.

Royalston is special because it is a very rural location. It's a place where people can get 'back to nature' and yet it is not far from a major metropolitan city (Boston).

There's never a shortage of hiking trails, old roads, and overgrown stone foundations to find and explore!

Rural nature. Lots of woods and the beautiful rivers and lakes.

The beauty ... the town's setting in nature

C. Community Input — About Royalston

Peaceful and calm atmosphere. Respondents frequently noted that Royalston is “quiet and peaceful,” which they enjoy. Some of the comments described that the quiet atmosphere of the Town was appealing because of the connection to outdoor landscapes and nature. A few respondents said that being further away from bigger cities, traffic and commercial presence are the main reasons why they enjoy the “quiet life” in Royalston. One participant framed being quiet and tranquil as strengths by default due to Royalston having little else to offer.

Rich history and tradition. Some respondents shared that history and tradition are important pillars of this community. They mentioned that past generations in the area make Royalston special, as many families have continued to stay in Royalston who have deeply established and historical family roots here. Many participants described the Town’s history as a mill town and some referred to its past as a farming community. Some participants described Royalston’s long-standing form of governance through direct participation with their neighbors in Town Meetings as evoking a connection to the history of the Town and to a tradition of participation and engagement in Town matters.

[It’s] the calmness of a village ...

[Royalston] is country charm, quiet, peaceful, and a relaxing town.

[It’s a] quiet, picture perfect, little sleepy bedroom, kind of town, [and] an awesome community.

Royalston is home to a variety of people. Blue-collar folks, artists, teachers, farmers, etc. I think that a lot of people find comfort and stability in a calm town such as Royalston.

Other than being a quiet tranquil town, Royalston has little to offer.

People [are] working to keep their community vibrant while preserving history and traditions. I love the South Village.

Royalston has a rich history and is surrounded by beautiful nature.

The unique common and the special village of South Royalston, the history visible in both places. democracy at work in Town Meeting.

[Royalston has] history as farming and mill town ...

C. Community Input — About Royalston

Environmentally conscious. Some participants shared that living near scenic landscapes and being surrounded by nature has created a deep sense of support for conservation and sustainability among residents.

Family-oriented. Comments suggested that having a strong sense of community involvement among residents and living close to neighbors for decades has given residents a sense of familiarity that felt comfortable and safe for raising their families. One participant shared that she remembers the community “feeling like family” because they grew up knowing everyone. A few comments suggested that Royalston’s family-friendly reputation is connected to the comfort and stability of its peaceful location.

[This is] a rural setting with many acres of protected land.

The beautiful landscapes Town politics that support sustainability and environmental protection.

There are still many generational families. It’s a place you were proud to grow up in and proud to raise your own family.

It [was] the perfect town to grow up in Everyone knew everybody and was always willing to help each other. It was like family.

It’s a nice place to live and bring up children.

C. Community Input — About Royalston

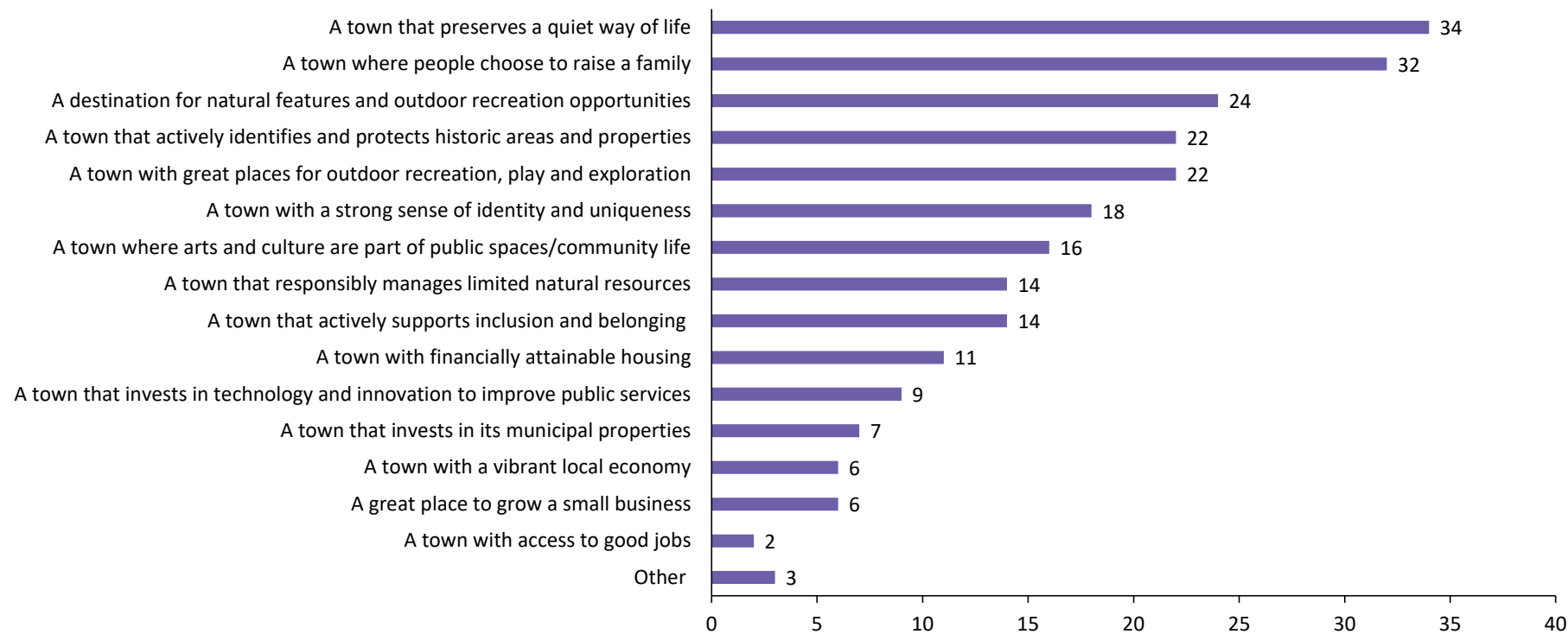
What Royalston Should Be in the Future

Survey participants selected up to four statements that best reflected what they believe Royalston should be in the future. Figure C-9 depicts answers by frequency.

Most frequently selected answers include “a town that preserves a quiet way of life” and “a town where people choose to raise a family.” Participants also frequently selected answers related to outdoor recreation and protecting historic properties.

A few participants selected “other” and included comments about the Town incorporating bed and breakfasts or antique shops.

C-9. Royalston’s future



Note: N = 64. Participants could select up to four answers.

Source: Keen Independent Research.

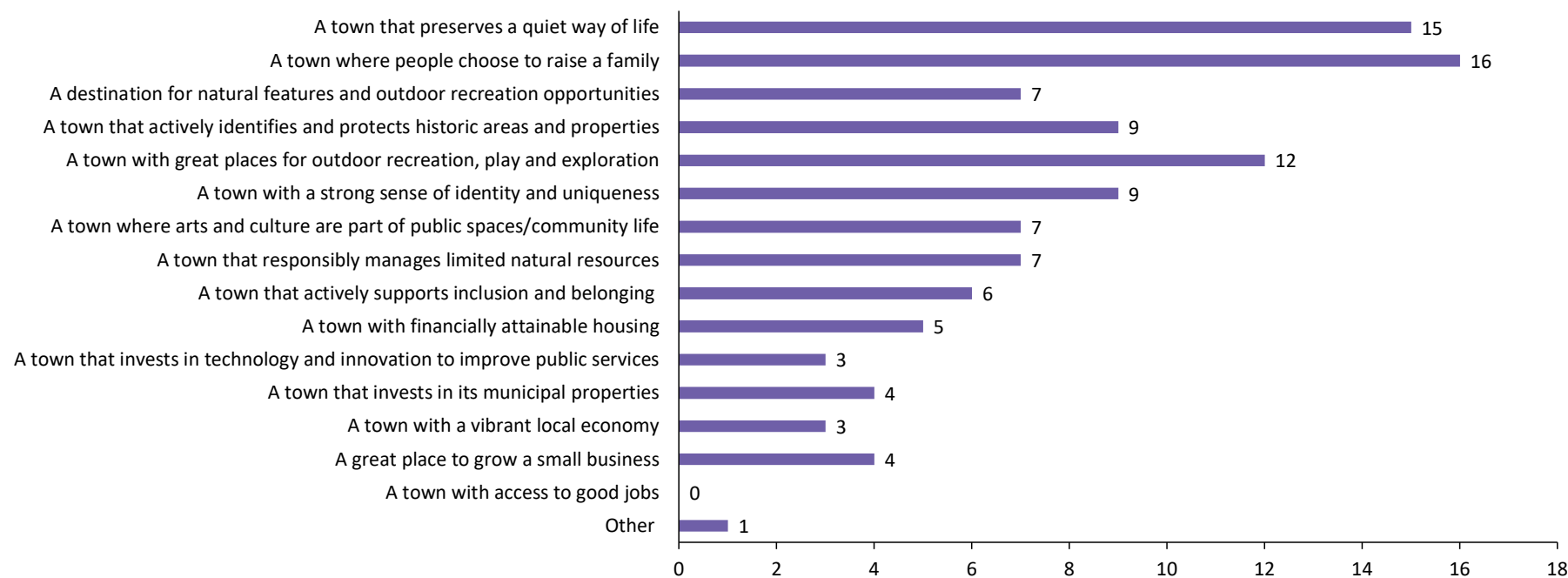
C. Community Input — About Royalston

Participants under age 55. Participants under age 55 most frequently selected “a town where people choose to raise a family” and “a town that preserves a quiet way of life.”

Participants under age 55 were next most likely to select “a town with great places for outdoor recreation, play and exploration.”

Answer choices in Figure C-10 are ordered in the frequency selected by overall participants (as shown in Figure C-9) to depict differences relative to overall responses.

C-10. Royalston’s future selected by participants under age 55



Note: N = 29. Participants could select up to four answers.

Source: Keen Independent Research.

C. Community Input — About Royalston

Royalston’s Greatest Needs as a Community

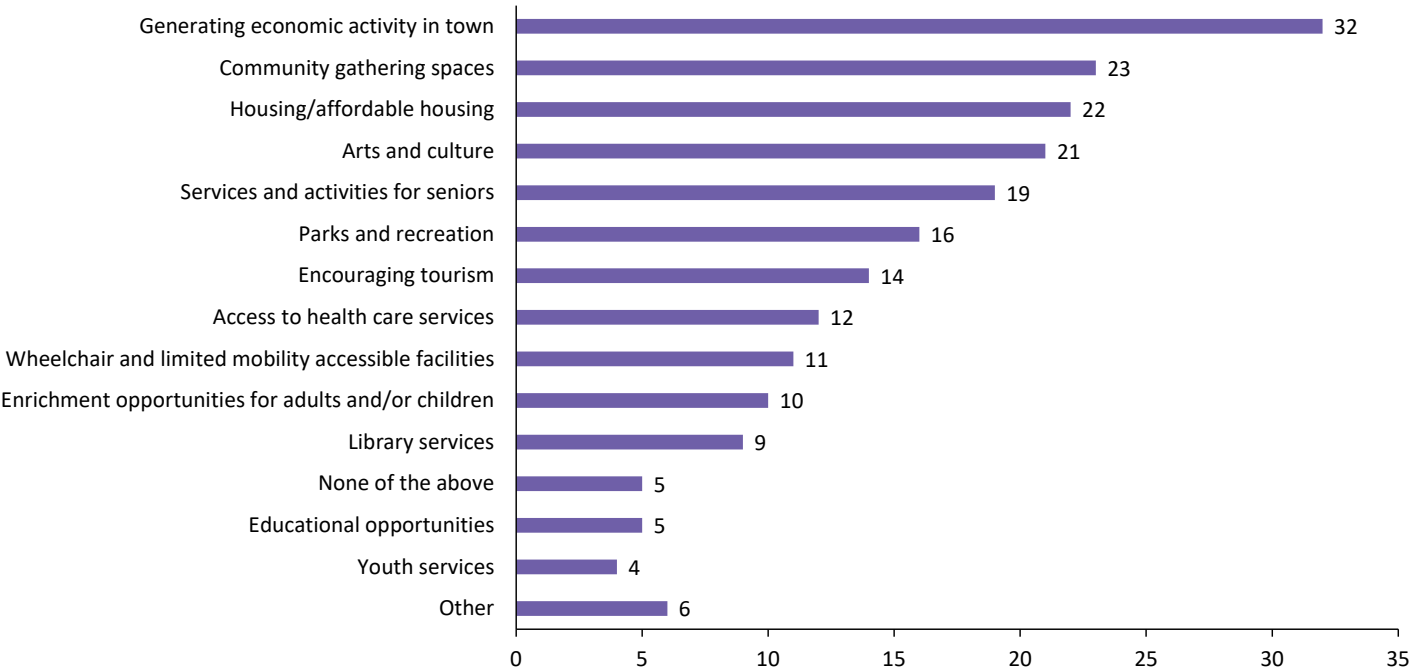
Survey participants selected up to four statements that best reflected what they believe to be Royalston’s greatest needs. Figure C-11 depicts responses by frequency. Participants most frequently indicated that Royalston’s greatest need is generating economic activity.

Participants who selected “other” included comments related to office space for Town departments and permitting more private businesses. Five participants selected “none of the above.”

[We need] the ability to capture and monetize the incredible volume of people who come through town to see our natural resources

Be financially able to continue as a town.

C-11. Royalston’s greatest needs



Note: N = 64. Participants could select up to four answers.

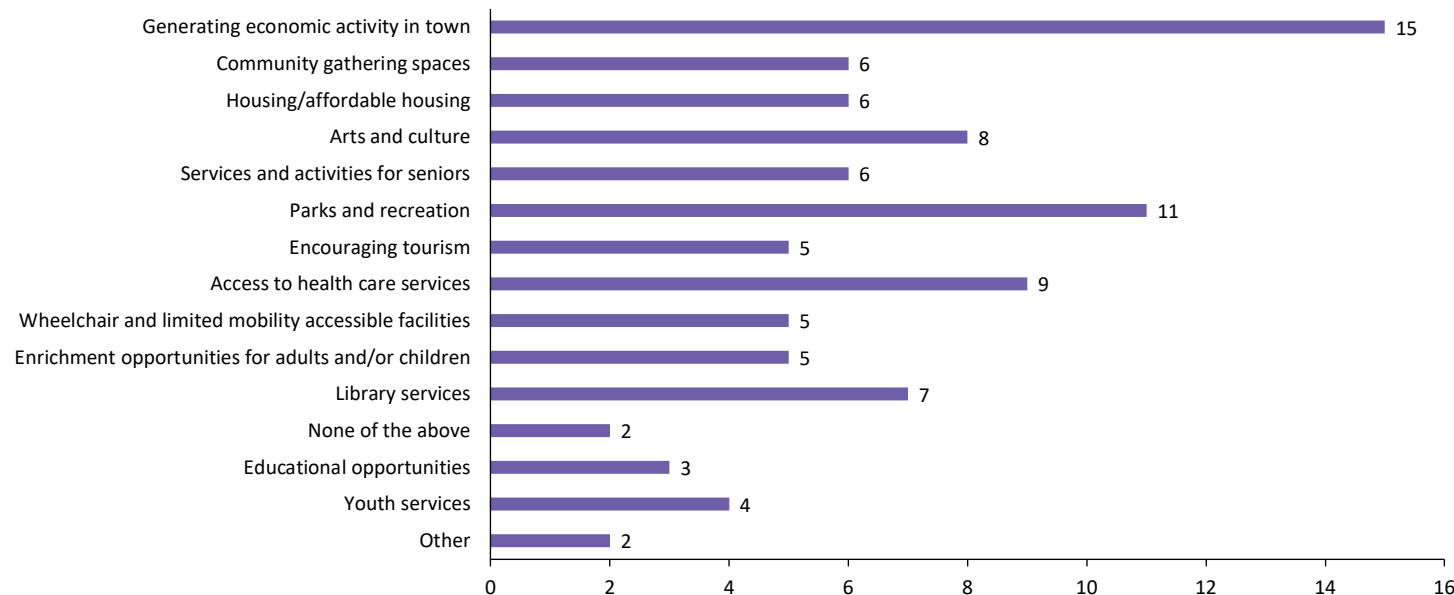
Source: Keen Independent Research.

C. Community Input — About Royalston

Participants under age 55. Like overall participants, those under age 55 most frequently selected “generating economic activity in town” as Royalston’s greatest need.

Answer choices in Figure C-12 are ordered in the frequency selected by overall participants (as shown in Figure C-11) to depict differences. After “generating economic activity” participants under age 55 most frequently selected “parks and recreation,” “access to health care” and “library services.” This contrasts to the overall participants across all age groups who prioritized “community gathering spaces,” “housing” and arts and culture” after “generating economic activity.”

C-12. Royalston’s greatest needs selected by participants under age 55



Note: N = 29. Participants could select up to four answers.
Source: Keen Independent Research

Whitney Hall Word Associations

C-13. Words that come to mind about Whitney Hall



C. Community Input — About Whitney Hall

The study team analyzed the words and phrases associated with Whitney Hall and identified three predominant themes:

- **A former icon with future potential.** Words such as “essential” and “iconic” reflect hope that Whitney Hall’s future might include restoration and revitalization. One public meeting participant referred to it as a “sleeping beauty.”
- **Source of nostalgia.** Some participants associate Whitney Hall with fond memories of school days. These included specific teachers’ names, “hand-rung recess bell” and “Friday night dances.”
- **Lost cause.** Many participants described Whitney Hall with words such as “burden,” “money pit,” “white elephant” and “dump.”

[Whitney Hall] is a bit of a burden now, but it could with the right plan be a tremendous asset to South Royalston.

It’s unique [with] interesting architecture, which is central to the village historically as a gathering place. It’s an integral part of the village. What would [the Village] look like without [Whitney Hall]?

Whitney Hall was built as a place for the community to come together; [the] second floor is special and should never be replaced.

This is an old, dilapidated building, [and] painting it will only make it look good, but it’s rotting away.

C. Community Input — Whitney Hall’s future

Potential Purposes

Survey respondents were presented with a series of statements about potential uses of Whitney Hall and asked to rate their agreement or disagreement with each on a scale from one to five where one was “strongly disagree” and five was “strongly agree.” Figure C-14 depicts the distribution of ratings for each statement about potential purposes for Whitney Hall.

Net rating. The column to the right in Figure C-14 provides a snapshot of the favorability toward different options. The net rating is calculated by subtracting the percentage of responses that disagree or strongly disagree from those that agree or strongly agree with each option.

Participants tended to favor uses that meet a high priority community need or generate economic activity. They were also positively inclined toward use for town gatherings, meetings and events. Participants tended to disfavor use as a museum, incubator or for offices/studios.

C-14. Potential purposes ratings

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree	Net rating
Meet a high priority community need	22 %	8 %	21 %	14 %	35 %	19 %
Generate economic activity for the community	22	8	22	25	22	17
Provide space for town gatherings, meetings and events	24	10	19	22	25	14
Provide courses/recreation/enrichment for adults or children	23	18	16	18	26	3
Provide arts and culture opportunities	30	13	20	15	23	-5
Support tourism to the area as a gateway to recreation/other assets	27	16	19	16	21	-6
Provide a place for food and beverage options	26	13	31	11	19	-8
Provide rentable office space for businesses	30	19	24	19	8	-22
Provide studios for artists	30	21	21	23	5	-23
Used for Town offices	40	11	24	8	16	-27
Incubate innovation/creativity workforce or business development	27	27	19	15	11	-29
Used for exhibits that educate about Royalston	34	23	21	13	10	-34

Note: N = 60 (minimum); 62 (maximum).

Source: Keen Independent Research

C. Community Input — Whitney Hall's future

Participants under age 55. Like overall participants, those under 55 tended to be divided about potential purposes but opinion tended to be most favorable toward using Whitney Hall to meet a high priority need or generate economic activity (see Figure C-15).

Like overall participants, those under 55 tended to disfavor use as a museum, incubator or for offices/studios. Participants in these age groups more strongly disagreed than participants overall with using Whitney Hall for Town offices, to provide food and beverage options and were less interested in using Whitney Hall to support Town gatherings, meetings or events.

C-15. Potential purposes ratings by participants under age 55

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree	Net rating
Meet a high priority community need	24 %	3 %	24 %	17 %	31 %	21 %
Generate economic activity for the community	28	3	21	17	31	17
Provide space for town gatherings, meetings and events	24	10	28	17	21	3
Provide courses/recreation/enrichment for adults or children	21	24	10	21	24	0
Provide arts and culture opportunities	28	17	17	14	24	-7
Support tourism to the area as a gateway to recreation/other assets	34	10	21	10	24	-10
Provide a place for food and beverage options	34	14	31	3	17	-28
Provide rentable office space for businesses	34	17	28	17	3	-31
Provide studios for artists	31	21	21	24	3	-24
Used for Town offices	41	17	24	7	10	-41
Incubate innovation/creativity workforce or business development	24	31	17	10	17	-28
Used for exhibits that educate about Royalston	31	34	17	7	10	-48

Note: N = 29.

Source: Keen Independent Research

C. Community Input — Whitney Hall's future

Qualitative Analysis Regarding Potential Purposes

Interviews, group discussion public comments via our dedicated study email address and hotline and open-ended comments in the virtual workshop survey addressed ideas for Whitney Hall's future.

Businesses for economic growth. Many participants indicated that it would be valuable to Royalston to have some businesses such as restaurants, bed and breakfasts, outdoor recreation services or a store to generate economic activity for the Town. Some discussed this as an opportunity to revitalize the area around Whitney Hall, which formerly offered a restaurant and the Country Store. Some residents want to keep the “small town” feel, and therefore were not interested in adding businesses.

Dining. Related to the wish to generate economic activity, some participants envision dining opportunities, such as a restaurant, bakery or café. Some suggested including outdoor seating.

Tourist destination. Ideas for using the space to attract tourists were often mentioned with discussion about expanding businesses and dining options. Some noted that without businesses to capture positive economic impact from visitors, the Town reaps no benefit from tourism. Some participants recognized that attracting tourists will be difficult without services and outlets to meet their needs. Some suggested that with investment Whitney Hall could help fill this gap and support making Royalston a destination. Making Royalston a destination for visitors, however, prompted mixed reactions. Some participants favored keeping the Town quiet and small, while others felt that that “a sustainable model [needs to be] created to attract more people.” One suggested it might be a wedding venue.

Whitney Hall is part of a larger economic picture. Re-opening of the Country Store is tied to other economic activity, especially with respect to Whitney Hall. Together, and with cultivation of nearby tourist assets, [saving the Country Store and Whitney Hall] may be possible. Without the store and without Whitney Hall, the village would lose its character and the Town would lose its only opportunity to have space for community gathering.

I would like to see the history and historic feel of Whitney Hall maintained and used for the community. If possible, it would be nice to see at least part of it used to generate income, perhaps renting office or studio space to businesses or artists. The rest should be open for town events.

It's hard for a community like Royalston – a lot of the [issues] are tied to economic development.

I don't want a lot of businesses ... things like gas stations. That's not the character of our town. We also don't have any money, [so] that makes it difficult to decide if you want to attract more ... [The Town] [has] very much been a bedroom community.

There used to be a coffee shop and music at the gazebo. The market was open too ... You can't even get a hot dog when you're done hiking.

I think someone with a dream to have a B&B ... can be found to buy the building and invest their money and create a very successful business.

If there's interest, [Whitney Hall] will bring people to town.

C. Community Input — Whitney Hall's future

Potential housing. Some participants suggested Whitney Hall could be used to provide affordable housing in Royalston. Comments about housing often focused on housing opportunities that could enable residents to stay in Royalston as they age.

Community center/senior center. Many participants highlighted the aging population and the need to support senior residents with a community center or gathering place dedicated to seniors. A few respondents shared concerns about accessibility requirements in order to make Whitney Hall suitable for this purpose and noted the need for elevators, additional bathrooms, ramps and level flooring. Some participants suggested the building could be a hub for community recreation such as dancing or place for clubs to gather.

Arts and culture. Some participants suggested Whitney Hall could be used as a hub for arts and culture in Royalston. Suggestions included performance venues for concerts, plays, recitals, exhibit or gallery space, studio space and an outlet for selling local arts and crafts items.

Affordable housing.

There's potential to get priced out of our homes if [we aren't] careful. We saw [non-Royalston residents] buying in Royalston during COVID. [It was] cheap and out of the city. It drove up prices.

Smaller communities all have an issue with aging in place.

[We need] housing for the elderly ...

[The community] want[s] housing, [but] the community doesn't want to invest.

[We need] a portion of [Whitney Hall] for a community center for clubs and seniors.

Senior center, perhaps with adjacent affordable senior citizen housing. The second floor is too valuable as a meeting place but would be a great community and senior citizen place.

[Use it] to enrich the lives of its senior residents.

First floor: multi-use space for concerts, art shows, etc. Other floors: artists spaces. Like Mill 5 in Lowell.

Some type of theater or music venue.

There are so many creative artists in town. [They] need paying customers. Classes, arts classes, a place to display their art ... it's a lot of little things. Will it be enough to sustain [Whitney Hall]?

C. Community Input — Whitney Hall's future

Committing to South Royalston Village. Some stakeholders expressed concern that South Royalston and its residents feel marginalized relative to central Royalston, near the Town Common. They point to the closure of the South Royalston Post Office decades prior and the more recent losses of the Country Store and restaurant and their impact on South Royalston Village. They express that the Town Offices in Whitney Hall have been the only remaining services in that part of town and that the possible closure of Whitney Hall is laden with meaning about the South Royalston area feeling less important than other parts of Town.

Comments along these lines were often less about specific potential uses of the building than about the need to “do something” that demonstrates that the Town values this part of the community and its residents and is maintaining an equitable commitment across the community.

Sell or demolish. A number of participants commented that Whitney Hall should be sold or torn down. Analysis of this input is included with the decision-making parameters discussion later in this Appendix.

South Royalston should not be forgotten! The town needs to accept the responsibility of maintaining this building and giving it back to the people!

The Town has always been split (i.e., North versus South Village) with the South always getting the short end of the stick.

South Royalston feels separated ... there's more trees than people.

C. Community Input — Whitney Hall’s future

Qualitative Analysis about Changing Whitney Hall

Public meeting participants submitted comments about openness to changing Whitney Hall. Comments were submitted anonymously on individual comment cards placed in envelopes to foster candor.

Could change. Participants answered the prompt, “What could change about Whitney Hall?”

- **Renovation.** Participants most often mentioned that the space should be renovated and modernized. Many mentioned accessibility improvements such as the addition of an elevator. Some noted the need to upgrade and/or add bathrooms. A couple of public meeting attendees specified that the interior floorplan could change. One participant qualified that renovation should not compromise the building’s “historical integrity.”
- **Infrastructure and systems.** A few comments pointed out the need to improve building features such as heating, electrical and insulation. One noted the need to improve safety.
- **Use.** A few comments encouraged increased and varied use. One suggested use for business and community needs in addition to Town needs. One suggested that the building does not need to be dedicated to Town offices.
- **Outdoor area.** One comment noted that the area behind the building “is ugly.”

Can’t change. Participants privately answered the prompt, “What absolutely can’t change about Whitney Hall?”

- **Exterior.** Participants most frequently mentioned the outside appearance, historic look and architecture of the building. Some mentioned specific features such as the color or sign.
- **Interior.** A couple of participants mentioned the woodwork and second floor.
- **Ownership.** A couple of participants argued for maintaining Town ownership and control of the building.
- **Housing.** A couple of participants expressed negativity toward use of the building for low-income housing.

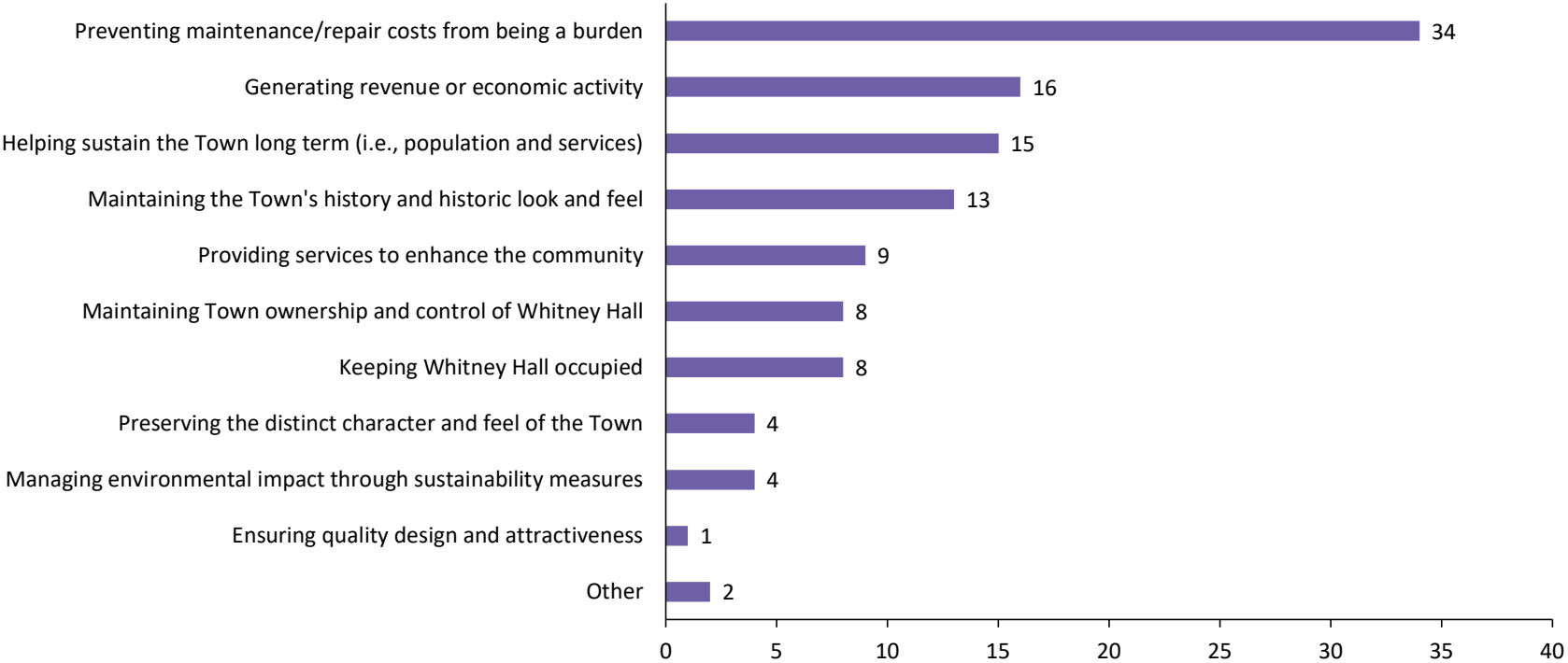
C. Community Input — Decision-making

Priorities

Survey respondents identified the two highest priorities for guiding decisions about the future of Whitney Hall from a list of ten provided answer choices. They also had the option to select “other” and fill in an open-ended response.

Figure C-16 illustrates how frequently participants selected each answer choice. Participants most frequently selected preventing maintenance and repair costs from burdening the Town and residents.

C-16. Decision-making priorities



Note: N = 63. Participants could select up to two answers.

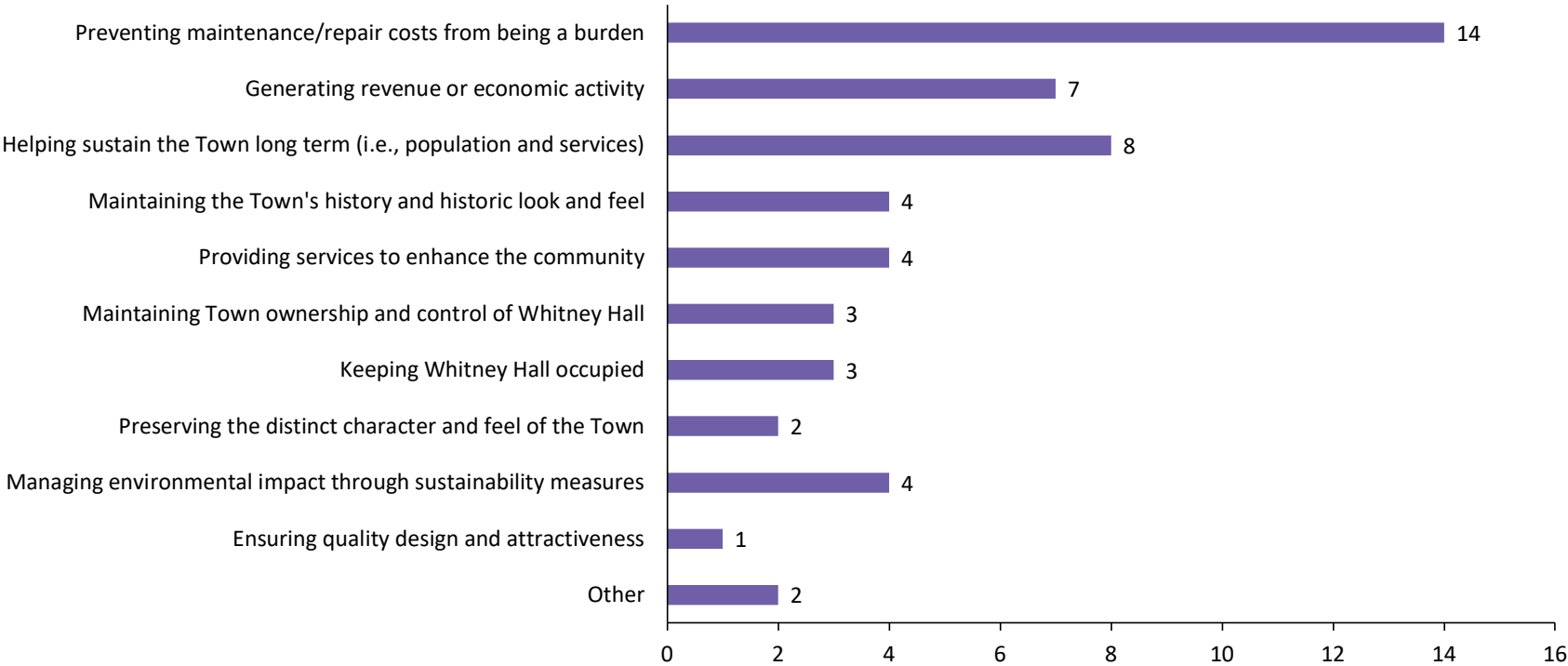
Source: Keen Independent Research

C. Community Input — Decision-making

Participants under age 55. Like overall participants, those under 55 most frequently selected preventing maintenance and repair costs from burdening the Town and residents as the highest priority to guide decision-making.

Answer choices in Figure C-17 are ordered in the frequency selected by overall participants (as shown in Figure C-16) to depict differences. Overall, decision-making priority distribution was similar for those under 55 and for participants overall.

C-17. Decision-making priorities selected by participants under age 55



Note: N = 29. Participants could select up to two answers.
Source: Keen Independent Research

C. Community Input — Decision-making

Parameters

Survey respondents were presented with a series of statements about potential parameters to guide decision-making regarding the future of Whitney Hall. They rated their agreement or disagreement with each on a scale from one to five where one was “strongly disagree” and five was “strongly agree.” Figure C-18 depicts the distribution of ratings for each statement about potential purposes for Whitney Hall.

The distribution of response shows areas in which community opinion is divided. For example, about as many participants are open to Whitney Hall being torn down as are not.

Net rating. The column to the right in Figure C-18 provides a snapshot of the favorability toward different decision-making parameters. The net rating is calculated by subtracting the percentage of responses that disagree or strongly disagree from those that agree or strongly agree with each statement.

Ratings tended to be more favorable toward selling Whitney Hall to a private party or maintaining it at little to no cost if possible. Ratings tended to disfavor maintaining Whitney Hall if doing so requires moderate or substantial investment or if the building is unoccupied.

C-18. Decision-making parameter ratings

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree	Net rating
I am open to Whitney Hall being sold to a private organization or developer.	18 %	8 %	16 %	21 %	36 %	31 %
Whitney Hall should be maintained by the Town only if it can be done at little to no cost to residents and the Town.	13	12	25	17	33	25
I am open to Whitney Hall being torn down.	40	5	12	12	32	-2
Whitney Hall should be maintained by the Town even if it requires moderate or substantial investment by Royalston and its residents.	38	12	23	10	17	-23
Whitney Hall's interior should be closed and kept unoccupied but the Town should invest in maintaining and preserving the building's historic exterior.	75	8	10	5	2	-76

Note: N = 60 (minimum); 62 (maximum).

Source: Keen Independent Research

C. Community Input — Decision-making

Participants under age 55. Like overall participants, the distribution of responses for those under 55 shows areas in which community opinion is divided. For example, only slightly more participants under 55 are open to Whitney Hall being torn down than are opposed to this option.

Like overall respondents, those under 55 were most favorable toward Whitney Hall being sold to a private party or maintaining it at little to no cost if possible. Ratings by participants under 55, like those overall, tended to disfavor maintaining Whitney Hall if doing so requires moderate or substantial investment or if the building is unoccupied.

C-19. Decision-making parameter ratings by participants under age 55

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree	Net rating
I am open to Whitney Hall being sold to a private organization or developer.	19 %	11 %	14 %	17 %	39 %	25 %
Whitney Hall should be maintained by the Town only if it can be done at little to no cost to residents and the Town.	14	18	18	18	32	18
I am open to Whitney Hall being torn down.	39	7	4	7	43	4
Whitney Hall should be maintained by the Town even if it requires moderate or substantial investment by Royalston and its residents.	36	11	29	14	11	-21
Whitney Hall's interior should be closed and kept unoccupied but the Town should invest in maintaining and preserving the building's historic exterior.	79	7	7	4	4	-79

Note: N = 21 (minimum); 25 (maximum).

Source: Keen Independent Research

C. Community Input — Decision-making

Qualitative Analysis Regarding Decision Factors

Keen Independent analyzed qualitative data regarding decisions facing Royalston about Whitney Hall. This section presents themes that emerged from participant comments.

Financial constraints. Comments aligned with ratings that disfavor moderate to substantial investment to maintain Whitney Hall. Some residents spoke of competing priorities for Town resources. One participant acknowledged that the cost would be high for Town resources alone but suggested pursuing grant funding to support Whitney Hall.

Face the fact that the Town can't afford to maintain it.

Spend as little money as possible the building is too far gone and doesn't make sense to use taxpayers' money to fix. If anything, tear it down or sell it.

We live in West Royalston and need brush cut and roads paved, and our cemetery taken care of. [If] the Town doesn't have money for any of that, then we shouldn't have millions of dollars for Whitney Hall.

Sell it and put the funds into the Raymond building for new town offices.

I would love to see it used for any purpose that eliminates the financial burden, but after all these years am highly skeptical that there is a viable path to accomplish that. I am prepared to support demolition.

C. Community Input — Decision-making

Sell or demolish. Some participants indicated that they see little future for Whitney Hall other than demolition and argued in favor of setting sentimental attachment aside to make pragmatic decisions. Some suggest attempting to sell it to a developer while others express skepticism that a sale is realistic given the condition of the building and indicated support for tearing it down.

You could try to sell or give it to a for-profit developer, but I doubt anyone would take it. Best would be to tear it down and use the land for something the whole town or South Village needs.

Tear it down. There is no for-profit, non-profit, or municipal use that would be cost-efficient with bringing it up to code, not to mention the long-deferred maintenance. It would probably be cheaper to tear it down and build a new replica.

Tear it down. We have better located buildings that require less rehab work and better location for any events or activity. There is no need for multiple buildings with the same functions.

[Whitney Hall has] served its purpose. Time to move on from the building.

Sell it. This will stop the taxpayers' burden of maintaining it.

Sell it and let someone else worry about the renovation and the upkeep.

I think people with sentimental attachment to the building need to be more realistic about its future. Many "nice old buildings" in the U.S. are gone due to economic reality.

Rip it down and fix the roads, get someone to fix and run the Country Store because there isn't even ONE PLACE IN THE WHOLE DAMN TOWN TO EVEN BUY A CUP OF COFFEE.

C. Community Input — Decision-making

Other comments. Some respondents provided feedback other than the categories discussed above. These included:

- **Useful purpose to the Town.** One participant indicated reluctance to expend Town resources on the building if it has no useful Town purpose and is not occupied.
- **Finding the money to preserve Whitney Hall as a Town landmark.** One participant expressed a sense that the Town has a duty to history and to its assets to find the money to care for Whitney Hall. Some comments suggested funding options such as grants or selling Raymond School to fund Whitney Hall.
- **Safety considerations.** A few comments raised concerns about the safety of the building.
- **Putting decisions about Whitney Hall in context.** One participant noted the value of making decisions about Whitney Hall informed by larger planning efforts. Another suggested thinking about future demographics.

I am in favor of the Town maintaining the building only if it is used for town business. If the building is Town owned and unoccupied, I don't support the use of taxpayer funds to maintain the building.

Whitney Hall is a Town asset. We need to take care of it, [and] we need to find the money ... This is part of the village ... it's iconic.

Perhaps some grants could be acquired to help with costs

Raymond School should be sold and all monies go toward the restoration of Whitney Hall for Town Offices.

Whitney Hall is one of the most dangerous buildings. If it goes, the fight will be to save the church. [Whitney Hall is] one of the biggest hazards we have in town.

Memories aside ... it's a dangerous building. It's time to move on.

... most of Whitney Hall is unused and possibly unsafe for use the Town needs to decide whether to maintain and use the Raymond School or maintain and use Whitney Hall ... I don't think we can afford both. In such a situation (and if indeed true), I kindly vote for the Raymond School.

It is hard to know ... the right answer without a comprehensive plan for the future of South Royalston Whatever the answer is for Whitney Hall, I hope it supports the future of a South Royalston where economic development can occur.

What do future generations want? Be careful not to have this pushed by elders ... future generations may have different priorities.

APPENDIX D. Case Studies — Introduction

Keen Independent presents profiles of relevant case studies for Royaston's Whitey Hall. These case studies were sourced primarily based on suggestions from Royalston community members.

Concepts explored. We reviewed case studies with operations related to offices, retail, affordable housing and tourism as well as case studies that considered the demolition and replacement of historic buildings.

This appendix features case studies of the following facilities:

- Petersham Country Store, Petersham, MA;
- Bedford Farmhouse, Bedford, MA;
- Orange Community Boathouse, Orange, MA;
- Nichewaug Inn, Petersham, MA;
- Princeton Center School, Princeton, MA;
- Red Apple Farm, Phillipston, MA;
- Orange Innovation Center, Orange, MA; and
- Wheeler Mansion, Orange, MA.

Senior housing developments. We also searched for small senior housing developments that could be comparable in size to Whitney Hall. According to a 2018 assessment prepared by Haynes, Lieneck and Smith, Inc., an architecture firm that assessed the potential to convert Whitney Hall to housing, the building would only be able to support about five units. Building Committee investigation between 2018 and 2020 found that the private developers would require a minimum of 14 units to make a project financially viable.¹ The smallest senior

housing development in a historic building that Keen Independent studied in rural Massachusetts was about 33 units.

While the historic structures hold a small number of units, a new development is typically included as part of the complex/community. Examples include:

- Becker College dorms in Leicester (66 units);²
- Henry T. Wing School building in Sandwich (128 units, with 10 units located within the historic school); and³
- Sanderson Place in Sunderland (33 units, with 3 located within a historic house)⁴

Overall Findings

Keen Independent identified the following themes from the case studies:

- Historic buildings can be adapted as community gathering places and for attracting tourism;
- A restoration project requires significant investment and identified champions to spearhead the effort;
- Lack of community consensus can prevent action, in some cases leading to no viable option other than demolition; and
- If the Town is unable to support the upkeep and a consensus cannot be reached regarding the use of Whitney Hall, demolition could be an alternative option.

¹ <https://www.royalston-ma.gov/building-committee/pages/whitney-hall>

² <https://www.telegram.com/story/news/2023/07/05/old-becker-college-buildings-being-converted-to-shelters/70383439007/>

³ <https://www.capecodtimes.com/story/news/2021/01/14/partial-demolition-historic-sandwich-school-allowed-more-info-sought-design/4161327001/>

⁴ <https://ruraldevelopmentinc.org/properties/sanderson-place/>

D. Case Studies — Petersham Country Store

Constructed in 1839, the building that is now known as the Petersham Country Store is considered “a central gathering place in the heart of the community.”⁵ Over the years, the store has changed ownership and been adapted a number of times. Aside from a few brief pauses, it has been in continuous operation since its construction.

Project origin and startup funding. In 2012, the facility was shuttered. According to the *Telegram & Gazette*, “The store is open today because community members willed it back to life, raising \$400,000 through donations, auctions, concerts and other fundraising events.” Community fundraising efforts were undertaken in collaboration with a nonprofit organization, the East Quabbin Land Trust. Other factors that contributed to the revival of this store included finding willing and effective operators, Ari and Jeanneane Pugliese, to run it.⁶

Ownership structure. The Petersham Country Store is owned by the nonprofit, East Quabbin Land Trust.⁷ The Country Store, an unusual holding for the Land Trust, is connected to the organization’s mission by its location at the edge of the Quabbin reservoir and its support of local farms by featuring their products among other items it sells.

Ongoing funding source. The Petersham Country Store is open daily and serves breakfast and lunch. The Store also sells groceries, gifts, art and other items. East Quabbin Land Trust as a nonprofit organization may also support the store through fundraising and other revenue sources. For example, the 2019 annual report lists capital improvements the organization made to the Country Store.

Economic impact/viability. In addition to being a gathering place for local residents, the Store is also featured in several articles as a recommended place to visit when in Petersham for an old-fashioned country store experience.

D-1. Outside the Petersham Country Store



Source: East Quabbin Land Trust.

⁵ Petersham Country Store, <https://petershamstore.com/about-us.html>

⁶ Barnes, G, “Products, patrons share community connections” in *Telegram & Gazette*, (July 14, 2017),

<https://www.telegram.com/story/news/local/north/2017/07/14/country-stores-of-central-mass-community-helped-revive-petersham-landmark/20106615007/>

⁷ <https://eqlt.org/our-properties/>

D. Case Studies — Bedford Farmhouse

The historic Bedford farmhouse is one of eight homes in a neighborhood dedicated to affordable and sustainable housing. This neighborhood runs along Carter Way, a street named in honor of Jimmy Carter. Bedford has a population of 14,161 and a median household income of \$143,736.⁸

Project origin and startup funding. Town of Bedford approved \$600,000 in Community Preservation Act (CPA) funds and worked with Habitat for Humanity of Greater Lowell for the construction of this Carter Way neighborhood, which included the renovation of the historic farmhouse and seven other affordable homes.

The project for the greater neighborhood had various forms of assistance from local students and volunteers as well as companies such as Building Science Corporation, IBEW local 103, Devens Recycling Center, Thrivent Financial, Millipore of Bedford, Cisco, Eastern Bank, Middlesex Savings Bank, Keurig, Thermo Fisher Scientific, Re/MAX Real Estate, Bedford Insurance Agency, Whole Foods and Flatbread Pizza.⁹

Ownership structure. This project originated as a partnership between a public entity (Town of Bedford) and a private nonprofit entity (Habitat for Humanity). Once completed, Habitat for Humanity homes are typically owned by the families that live in them.¹⁰

⁸ United States Census Bureau (2022), <https://www.census.gov/quickfacts/fact/table/bedfordtownmiddlesexcountymassachusetts/RHI225222>

D-2. Bedford Farmhouse



Source: Habitat for Humanity of Greater Lowell.

⁹ <https://lowellhabitat.org/who-we-are/our-history/>

¹⁰ <https://www.habitat.org/about/faq#how>

D. Case Studies — Orange Community Boathouse

Acquired by the Town of Orange in 1952, the Orange Community Boathouse is a structure along the Millers River where Billy Goat Boats ran a watercraft rental business until 2023. The Town of Orange has a population of about 7,575 and median household income of \$56,000.¹¹

Ownership structure. The Town of Orange owns the Boathouse with the intent to partner with a private operator in support of ecotourism. As of January 2024, the Town has an RFP out for the lease and operation of the Boathouse for up to 20 years.

Ongoing funding source. Previously, the Town leased the facility to Billy Goat Boats for \$1 per year. Billy Goat Boats funded the operations of the boathouse through watercraft rentals.

Economic impact/viability. According to the Town of Orange 2020 Economic Development Plan, the Town decided to capitalize on the North Quabbin Region's investment in ecotourism by purchasing an adjacent lot along the riverfront to maximize the effectiveness of the operations of the Boathouse. Billy Goat Boats estimated that they had about 1,000 users during peak season.¹²

¹¹ United States Census Bureau (2022), <https://www.census.gov/quickfacts/fact/table/orangetownfranklincountymassachusetts,US/PST045223>

D-3. Orange Community Boathouse



Source: Greenfield Recorder.

¹² <https://www.townoforange.org/DocumentCenter/View/235/EDIC-ED-Plan-PDF>

D. Case Studies — Nichewaug Inn

Until its demolition in 2022, Nichewaug Inn was a prominent feature in Petersham, Massachusetts. Petersham has a population of about 1,183; and¹³ median household income of \$83,771.¹⁴

History. Nichewaug Inn was built in 1899 as a resort hotel after a fire destroyed an earlier version of the inn. During the first half of the 20th Century, Nichewaug Inn served as a summer resort for tourists. From 1952 to 1973, the Nichewaug Inn served as a parochial boarding school for girls. This was the last time that the facility was utilized.

Nichewaug Inn and its neighborhood became designated as the Petersham Historic District in 1967, which was added to the National Register of Historic Places in 1982.¹⁵

Town ownership. In 2007, the Town of Petersham acquired the Nichewaug Inn property. Although many options were explored, the Town could not determine a path forward for the facility. Until its demolition in 2022, the Town and its residents made a number of attempts to repurpose or demolish the facility, but barriers to acquiring adequate funding and lack of community consensus prevented the Town from moving forward with either option.

Demolition. In 2022, Town voters approved the demolition of the building for \$721,000. The town funded this demolition with \$100,000 in American Rescue Plan Act (ARPA) funds and by borrowing \$621,000.¹⁶

Lessons learned. The Commonwealth Beacon described the story of the Nichewaug Inn as “a cautionary tale of the strong headwinds often faced in trying to preserve historic, but aging, structures, especially in places with weaker real estate markets.”¹⁷ The small town’s slow economy, weak real estate market and challenges with finding funding and consensus coupled with the building’s age, hazards and other ailments, created a number of challenges to reuse of the facility.

D-4. Nichewaug Inn



Source: Wikipedia Commons.

¹³ “Petersham, Massachusetts population by year” in *Neilsberg Research* (September 18, 2023), <https://www.neilsberg.com/insights/petersham-ma-population-by-year/>.

¹⁴ “Petersham, Massachusetts median household income by age” in *Neilsberg Research* (December 3, 2023), <https://www.neilsberg.com/insights/petersham-ma-median-household-income-by-age/>

¹⁵ “All-Options RFP for the Nichewaug Inn & Academy Property” Town of Petersham, MA (November 6, 2017), https://docs.wixstatic.com/ugd/ba2a96_c6b3d47bdcb64029a0ec6289c5b0074b.pdf

¹⁶ Vine, G, “Petersham: Nichewaug demolition commencing” in *Athol Daily News* (August 5, 2022), <https://www.atholdailynews.com/Nichewaug-demolition-under-way-47492183>

¹⁷ Schoenberg, S, “Small-town challenges and conflicts plague efforts to save historic inn” in *Commonwealth Beacon* (April 3, 2022), <https://commonwealthbeacon.org/arts-and-culture/small-town-challenges-and-conflicts-plague-efforts-to-save-historic-nichewaug-inn/>

D. Case Studies — Other case studies

Princeton Center School

Built in 1906, the Princeton Center School operated as a school until 1991, when the nearby Thomas Prince School expanded to accommodate kindergarten through 8th grade. According to the Friends of Princeton Center School Facebook page, the building was used for various activities after the school closed. In 2017, the building was closed to the public due to safety concerns.¹⁸

In 2021, the Town of Princeton voted whether to replace the Princeton Center School with a new public safety building. According to the minutes from this meeting, the vote did not reach the required two-thirds majority to pass.¹⁹

The grounds of the school, which includes a baseball field, walking track and playground area, are currently maintained by the Town's Parks and Recreation Department.²⁰

Red Apple Farm

Red Apple Farm of Phillipston, MA has been a multigenerational family farm since 1912. It serves as a major attraction for tourists and residents in North Central Massachusetts. The farm has also since expanded to include a taproom and other storefronts in Boston and Wachusett Mountain. The farm includes a 1700's farmhouse in which the current farm owners live.

¹⁸ Cleveland, K, "Safety concerns close town building" in *Telegram & Gazette* (July 31, 2017), <https://www.telegram.com/story/news/local/north/2017/07/31/princeton-center-building-closed-for-safety-concerns/20045501007/>

¹⁹ https://www.town.princeton.ma.us/sites/g/files/vyhli4891/f/pages/5.15.2021_atm_mlnotes_final_v2.pdf

Orange Innovation Center

Constructed in the 1890's the Orange Innovation Center was originally a food production facility. It was later turned into a furniture manufacturing facility until the early 2000's when it became a commercial rental space. Today, it is owned by Jack Dunphy, who funds the operation of the building by renting out suites and artist lofts.²¹

Wheeler Mansion

Originally constructed in 1903 as a private residence, the Wheeler Mansion in Orange, MA was considered an architectural gem. After the original owner died in 1925, the mansion was converted into a rest home. In 1990, this home was sold and used as a private residence until its foreclosure in 2015. After about five years, a "Save this House" Instagram page featured the Wheeler Mansion. It was then later sold to Cynthia Butler in a property auction with the intention of saving the mansion and using it as an event venue and Bed & Breakfast. Today, the Mansion is still a private residence, but it has event space that is available to rent.²²

The Wheeler Mansion hosts weddings and private rentals. It also offers Mansion tours, wellness events and festivals. The mansion features a shop that sells exclusive Wheeler Mansion merchandise.

²⁰ <https://www.town.princeton.ma.us/parks-and-recreation-department/pages/parks-recreation-facilities>

²¹ <https://orange-innovation.com/about>

²² <https://www.revivalwheelermansion.com/history/>

APPENDIX E. Options and Potential Funding Sources

Introduction

In this appendix, Keen Independent presents a synthesis of options the Town of Royalston might consider as it determines the future of Whitney Hall. This appendix also includes descriptions of potential funding sources.

Cost estimates and business plan constraints. Cost estimates and pro forma operating budgets depend on decisions about the focus and use of the building. Because the community lacks consensus around a priority community need and use for Whitney Hall, Keen Independent prepared an overall order of magnitude cost estimate related to renovation only. Operating costs will be use dependent and therefore are not forecasted as part of this analysis.

Revenue sources. Like cost estimates and operating budgets, revenue forecasts and funding sources depend on decisions about the focus and use of the building. Because the community lacks consensus about a priority community need and use for Whitney Hall, Keen Independent outlines funding sources generally and provides examples of options that may be applicable for the Town of Royalston. Decisions about a specific focus for Whitney Hall's future use may open the possibility for additional sources of funding related to the population served or the community issue to be addressed.

Overall Findings

Keen Independent identified the following themes from analysis of options and funding sources:

- Royalston's options fall into four categories:
 - Renovating and retaining sole responsibility for maintaining and operating Whitney Hall;
 - Entering into a public-private partnership (shared investment model) where Royalston would invest substantially in renovation and secure a partner whose primary role would be to operate a for-profit or nonprofit entity based at Whitney Hall;
 - Deferring the decision and "mothballing" Whitney Hall while clarifying Townwide priorities; and
 - Selling or demolishing Whitney Hall.
- Renovation cost estimates begin at \$4.6 million.
- Potentially applicable funding programs have grant sizes starting at about \$10,000 to \$15,000. No relevant program appears to offer awards greater than \$1 million.
- Community consensus is critical. For example:
 - Public borrowing and taxation require Town Meeting and voter approval;
 - Public-private partnerships require a substantial commitment of public resources and clear agreement about the partnership's purpose; and
 - Some funding programs require local matching funds or other indicators of community support.
- Private investment for an entrepreneurial venture and charitable giving are unlikely to be feasible solutions for Whitney Hall.

E. Options and Potential Funding Sources — Overview of options

Options Matrix

Figure E-1 provides an overview of options for the future of Whitney Hall organized into a matrix along two dimensions: degree of community control (more ownership or less ownership) and cost (higher and lower). In this section, the study team describes the major categories of options and potential advantages and disadvantages of each.

E-1. Matrix of options for Whitney Hall

	Higher cost	Lower cost
More ownership	Renovate Meet community needs or improve quality of life For revenue-generating purposes	Defer decision Mothball (i.e., no occupancy) Conduct broader strategic master plan for the Town
Less ownership	Shared investment Issue RFP to seek partner Share costs and responsibility	Sell or demolish Sell with incentives Demolish

Source: Keen Independent Research.

E. Options and Potential Funding Sources — Overview of options

Renovate

The Town of Royalston might opt to maintain ownership and invest in renovating Whitney Hall. Adaptive reuse of the historic building could be designed to meet community needs, to drive economic activity in Royalston or to otherwise improve the quality of life. This option would enable the community to maintain a high degree of control over the building and the land on which it sits.

Order-of-magnitude cost estimates. As represented in Figure E-2, Keen Independent estimates order of magnitude renovation expense using current 2024 industry costs which can range from approximately \$400 per square foot to \$1,400 per square foot. On an estimated square footage of 11,682, renovation cost forecasts range from approximately \$4.7 million to approximately \$16.4 million. These costs represent capital expenses only. Operating costs for the building and any new services, programs or enterprises would be additional and depend on the purpose for which Whitney Hall would be used.

E-2. Order of magnitude renovation cost examples

Estimate range	Low	Mid	High
Based on 11,682 estimated square feet			
Cost per square foot	\$ 400	\$ 900	\$ 1,400
Sub total	\$ 4,672,800	\$ 10,513,800	\$ 16,354,800

Source: Keen Independent Research.

E. Options and Potential Funding Sources — Overview of options

Defer Decision

The Town of Royalston might opt to defer the decision about the future of Whitney Hall to allow time for a townwide strategic master planning process. Completing a master plan would allow Royalston to establish municipal priorities and build community consensus. This option, depicted in the upper right quadrant of the matrix in Figure E-1, would enable Royalston to retain control and minimize expenditures of public funds until decisions about Whitney Hall can be made in the context of other community priorities and initiatives.

In this scenario, the Town would “mothball” the building, taking necessary steps to shut down building systems and seal the interior to prevent damage and minimize further deterioration. Town offices would need to be consolidated into another municipal property in order to end occupancy of the building.

Shared Investment

When public resources are limited, partnering with private entities can offer an avenue to expand financial capacity and achieve public goals. Public-private partnerships describe formal arrangements between a public entity and a private entity who collaborate to jointly provide a project, product and/or service.¹

The private half of a public-private partnership can refer to either a nonprofit or for-profit entity. For-profit partners enter such agreements to operate businesses that are expected generate revenue. Nonprofit partners might enter such partnerships as a means to fulfill their mission.

Identifying potential partners. The Town of Royalston might opt to seek a private partner via a request for proposals with whom it will share costs and responsibility. This option is depicted in the lower left quadrant of the options matrix in Figure E-1.

Requirements and expectations. A public-private partnership model would require the Town to share control and responsibility with a partner. However, best practices for such partnerships involve formal, legal agreements that may include stipulations enabling Royalston to maintain compliance with certain Town expectations or priorities.

A shared investment solution is also expected to be a higher cost option. The level of deferred maintenance to be addressed would likely deter entrepreneurial or other types of partners if the Town did not commit substantial resources to capital improvements.

¹ Mason, D. (2022). *Introduction to the nonprofit sector*. (p. 61)

E. Options and Potential Funding Sources — Overview of options

Sell or Demolish

The Town of Royalston could relinquish ownership of Whitney Hall by selling it or demolishing it. These options are depicted in the lower left quadrant of the matrix in Figure E-1.

Selling Whitney Hall might be accomplished by offering substantial incentives. Unlike a shared investment model, this option would involve a sale with no strings attached and the Town would have little say, other than via zoning restrictions, about the future of the property.

Demolishing Whitney Hall would remove the building from the Town's inventory but would maintain the land, which the Town could retain and repurpose or sell.

Potential costs. Options to sell or demolish Whitney Hall are likely lower cost than renovation and shared investment options, but they are unlikely to be free. Attracting a buyer for a property with substantial deficiencies and unknown potential hazards may require Town investment in incentives.

Demolishing the property also requires investment. As noted in Appendix D, the Town of Petersham demolished the Nichewaug Inn in 2022, five years after acquiring it, at a cost of over \$700,000, \$621,000 of which the Town had to borrow.

E. Options and Potential Funding Sources — Funding options

Keen Independent assessed funding options for Whitney Hall. Potential funding sources can be classified into four categories as follows:

- Public funding through state or federal programs;
- Public borrowing/taxpayer support;
- Private investors; and
- Private donors.

Next the study team describes each of these categories.

Public Funding/State or Federal Programs

Royalston could pursue funding through public funding programs for Whitney Hall.

Potential public building program for rural communities

Legislative action could result in future funding options relevant to Whitney Hall. Massachusetts legislators have introduced a bill to create a public building construction program for rural communities similar to the Massachusetts School Building Authority (MSBA) or the Massachusetts Public Library Construction (MPLCP) grant program. Based on school and library building programs, a rural building program might include a competitive process, a local matching fund requirement and a limitation to one building per town for a period of years.

Although the introduction of legislation is no guarantee of passage, the effort indicates that legislators have recognized the need to fund capital improvements to public buildings in small communities and are working on a solution. Legislative staff interviewed by the Keen Independent study team indicate that the proposed bill includes a funding source, which increases the likelihood of the bill's success.

Massachusetts Historical Commission

The Massachusetts Historical Commission offers two funding programs: The Massachusetts Preservation Projects Fund (MPPF) and Survey and Planning Grants. Listing on the State Register of Historic Places is a prerequisite for MPPF grant applicants, which precludes Whitney Hall from eligibility. The Commission's Survey and Planning Program, listed below, is not restricted to entities with state register listings.

Survey and Planning Grant

Purpose: Historic preservation planning activities such as cultural resource inventories, community preservation plans and other studies or projects related to the identification and protection of significant historic buildings and structures.

Grant range: \$10,000 to \$20,000 (requires a local 1:1 match)

E. Options and Potential Funding Sources — Funding options

Community Preservation Act (CPA)

Massachusetts state law enables communities to vote by referendum on a surcharge on local property taxes that is matched by state trust funds. CPA participating communities can use revenue from the program toward open space (including parks and recreation land), affordable housing and historic buildings. Annual appropriations made by a community-based committee must allocate at least 10 percent of the available funds toward each of the eligible program categories.²

Royalston passed its CPA referendum in 2009 by a small majority (53%).³ Including the property tax surcharge and matching trust fund revenue, Royalston's annual revenue under the CPA has ranged from approximately \$33,000 to about \$65,000.⁴ The annual revenue from the CPA will be insufficient for a renovation of Whitney Hall, for example, but the CPA allows appropriations to be reserved for future use which could allow Royalston to accumulate a more sizable pool of funding to apply toward an eligible project that uses Whitney Hall or the land on which it sits. Over the 14 years that Royalston has participated in the CPA, its revenues under the program have been \$608,000 cumulatively.⁵

E-3. The “Pete and Henry’s lot, purchased by the Town of Royalston with CPA funds



Source: Keen Independent Research.

²

https://www.communitypreservation.org/sites/g/files/vyhlf4646/f/uploads/igr_2019-14.pdf

³ https://www.communitypreservation.org/cpc-report?report_src=bbzvidkqg|a=dr&rid=331

⁴ Ibid.

⁵ https://www.communitypreservation.org/cpc-report?report_src=bbzvidkqg|a=dr&rid=331

E. Options and Potential Funding Sources — Funding options

Massachusetts Community One-Stop for Growth

Community One Stop for Growth is a portal through which Massachusetts municipalities and other eligible applicants can seek funding through a consolidated application and review process for 12 community and economic development grant programs. The program includes funding sources administered by the Executive Office of Housing and Economic Development (EOHED), the Department of Housing and Community Development (DHCD) and Massachusetts Development Finance Agency (MassDevelopment).

Sample grant programs integrated into the Community One-Stop for Growth application process that may be relevant for the Town of Royalston are listed below.

Rural and Small Town Development Fund

Purpose: Community planning, zoning revisions, feasibility, engineering, designs and construction of physical infrastructure and of existing and new buildings, rehabilitation, due diligence, plan designs, market studies, pre-permitting/permitting, engineering, acquisition, demolition, and site related upgrades of future development sites.⁶

Grant range: \$50,000 to \$500,000.

Underutilized Properties Program

Purpose: Projects that will improve, rehabilitate or redevelop blighted, abandoned, vacant or underutilized properties to achieve the public purposes of eliminating blight, increasing housing production, supporting economic development projects, increasing the number of commercial buildings accessible to persons with disabilities. Funds may be used for predevelopment or capital improvements essential to the occupancy or increased occupancy of existing structures including building stabilization, roof repair, HVAC system improvements, tenant improvements, compliance with building code(s), fire/life safety system regulations, accessibility requirements, seismic code and other similar regulations.⁷

Grant range: \$50,000 to \$1 million

Brownfields Redevelopment Fund

Purpose: Environmental assessment or remediation of municipally owned sites.

Grant range: \$250,000 (assessment) to \$750,000 (remediation).

⁶ <https://www.mass.gov/doc/fy24-rural-and-small-town-development-fund-guidelines/download>

⁷ https://www.massdevelopment.com/assets/what-we-offer/underutilized-properties/Underutilized_Properties_Program_Guidelines_FY23_-_FINAL.pdf

E. Options and Potential Funding Sources — Funding options

Federal Programs

Federal programs may be sources of support Royalston could pursue depending on the purpose determined for Whitney Hall.

U.S. Department of Housing and Urban Development Community Development Block Grants

Purpose: Housing rehabilitation/development, infrastructure community/public facilities, planning, removal of barriers to allow access by persons with disabilities, area revitalization and others. Each project must meet at least one national program objective: benefit low- and moderate-income person, prevent or eliminate slums or blight, or address community development needs that have particular urgency.⁸

Grant range: \$10,000 (planning/design); \$100,000 to \$950,000

U.S. Department of Agriculture Rural Community Development Initiative

Purpose: Housing, community facilities, community/economic development in rural areas

Grant range: \$50,000 to \$500,000 (requires a 1:1 local match)

National Trust for Historic Preservation (Various Grant Programs)

Purpose: Preservation planning or education projects

Grant range: \$15,000 maximum (requires a 1:1 local match)

⁸ <https://www.hudexchange.info/programs/cdbg-state/state-cdbg-program-eligibility-requirements/>

E. Options and Potential Funding Sources — Funding options

Public Borrowing/Taxpayer Support

Royalston could borrow funding to support Whitney Hall. Municipal bonds are options that enable communities to finance public works exempt from state and federal taxes and repay the debt over time.⁹

Achieving Town consensus is critical to enable borrowing and related tax increases. In Massachusetts, for a Town Meeting to authorize borrowing requires a two-thirds vote.¹⁰ Repayment of debt typically requires a property tax increase that requires voter approval under the provisions of Proposition 2 ½, a state law passed in 1980 that limits property tax increases to 2 ½ percent annually.¹¹

Private Investors

Private investors or developers may invest solely or as part of a public-private partnership in the adaptive reuse of a historic property if doing so presents a viable option for achieving their business goals.

Entrepreneurial or business development efforts. Adaptive reuse of historic properties is sometimes funded by private investors interested in developing revenue generating, entrepreneurial initiatives. Examples, as detailed in Appendix D, include Orange Innovation Center and Wheeler Mansion. For a revenue generating endeavor, private investors would consider the level of investment required to renovate and convert a historic property as well as the surrounding factors in the local market area that could contribute to

the success of the initiative or create challenges to profitability. Private investors considering revenue generating business opportunities, would face substantial upfront costs given Whitney Hall's condition. They would likely also forecast limited revenue given the small population and other local market area conditions.

Public-private partnership/shared investment. In some cases, private parties work in collaboration with a Town in a public-private partnership model in which the private group or party is incentivized by the Town to develop or operate an organization that meets community priorities or economic revitalization goals. The Orange Community Boathouse described in Appendix D is an example.

Developing community consensus about the purpose and incentives for attracting a partner is a prerequisite to undertaking a request for proposals process for potential partners. Town does not currently have a master plan or economic development strategy, and as noted in Appendix C, Town residents lack consensus about community priorities.

Potential investors. No stakeholder who provided input to the study team was aware of any potential investors affiliated with or interested in Royalston with the means or interest to invest in revitalizing and repurposing Whitney Hall.

⁹Massachusetts Division of Local Services, "Understanding local debt" (January 2020), <https://www.mass.gov/doc/understanding-municipal-debt/download>

¹⁰ Ibid.

¹¹ Massachusetts Division of Local Services, "Levy Limits: A primer on proposition 2 ½" <https://www.mass.gov/doc/levy-limits-a-primer-on-proposition-2-12-0/download>

E. Options and Potential Funding Sources — Funding options

Private Donors

Philanthropy is another revenue source that is sometimes employed for adaptive reuse or preservation of historic properties.

Contribution sources may include organizations and/or individuals. Contributions result from organized efforts. Unanticipated, surprise gifts from major benefactors are exceptionally rare.

Effective private fundraising initiatives have a defined cause and case for support, dedicated volunteers and sometimes paid staff. Fundraising requires time to identify and develop relationships with prospective donors and intentional, sustained cultivation and solicitation efforts.

Potential individual donors. No stakeholder who provided input to the study team was aware of any potential benefactors affiliated with or interested in Royalston with the means or interest to contribute substantially toward Whitney Hall. Town members described grassroots fundraising efforts in Town as generating modest sums and as difficult to sustain through volunteer efforts.

Potential corporate donors. Communities that are home to corporations and businesses can approach those organizations for contributions and sponsorships. Royalston has no corporate entities or public-facing businesses to approach for underwriting.

Potential foundation donors. Keen Independent’s research finds private foundation grants to be an unlikely source of support for Whitney Hall. Only about 7 percent of U.S. grantmaking goes to rural communities.¹² Private philanthropic foundation eligibility guidelines frequently limit applicants by geographic location. Study team research was unable to identify any rural funders in New England with geographic eligibility inclusive of the Town of Royalston.

Some major national foundations support rural communities nationally but are focused on grantmaking priorities related to specific issues. For example, The Annie E. Casey Foundation funds work to end childhood poverty while the Robert Wood Johnson Foundation focuses on health equity.¹³ Once the Town of Royalston decides the future purpose of Whitney Hall, research may uncover additional grant funding opportunities.

¹² Ramirez, M, “Here are four major national funders supporting rural America,” in *Inside Philanthropy* (February 24, 2023),

<https://www.insidephilanthropy.com/home/2023/2/24/here-are-four-major-national-funders-supporting-rural-america>

¹³ Ibid.

E. Options and Potential Funding Sources — Funding options

Considerations related to soliciting gifts or using volunteer labor in a municipal context. Municipalities face certain limitations related to soliciting cash gifts or gifts of goods or services.

Fundraising and conflicts of interest. Massachusetts statutes regulate the ways in which municipal employees can engage in soliciting gifts on behalf of a municipality.¹⁴ State Ethics Commission guidelines also identify conflicts of interest that can arise when municipal employees or representatives solicit gifts of cash, goods or services from entities with which the municipality may do other business.

In addition, municipalities often lack the capacity to conduct fundraising activities and are sometimes ineligible for certain philanthropic funding sources. For these reasons, fundraising efforts for municipal organizations are often run by an affiliated 501(c)(3) such as a “Friend of” organization. Establishing an affiliated fundraising nonprofit for a municipal cause, requires motivated leadership willing to contribute substantial volunteer labor, legal guidance and a collaboration with the municipality to follow best practices for supporting organizations.

Pro bono services/volunteer labor. Legal constraints, ethical considerations and risk factors limit the solicitation of volunteer construction services for Whitney Hall renovation. In addition to regulations related to the solicitation of goods and services and conflict of interest considerations as described above, municipal entities must comply with procurement regulations in contracting services and statutory public building requirements.

In addition, risk mitigation steps for renovation of a municipally owned historic building include establishing clear scopes of work in legal agreements and using only licensed and bonded contractors who are well-qualified and trained in the identification and management of potential hazards common in historic buildings. In some cases, specialized contractors are required for the assessment and mitigation of hazardous materials or conditions.

¹⁴<https://www.mass.gov/info-details/summary-of-state-ethics-commission-formal-opinion-ec-coi-12-1>

ANNEX A

TRAHAN ARCHITECTS

Whitney Hall
Town of Royalston

SITE ASSESSMENT REPORT

July 21, 2023



SCHOOL ST

Second Congregational Church
of South Repulse



Site Assessment

Site Assessment

Keen Independent Research engaged Trahan Architects to provide a site assessment report for Whitney Hall located in Royalston, MA. The site assessment took place on Monday June 12th, 2023, from 10:30am until 12pm. Trahan Architects was accompanied by Alex Keen and Heather Calvin from Keen Independent Research and representatives from the Town of Royalston including Jaret Thiem & Deb D'Amico.

The site assessment's primary scope was to review existing fire/life safety, mechanical, electrical, and plumbing systems and provide an overview of structural and envelope building components.

This report has been prepared for the exclusive use of Keen Independent Research. Trahan Architects nor its employees or sub-consultants assume any responsibility for interpretation of the reports or extrapolations made from the reported contents.

Any use which a third party makes of this report, or any reliance on or decisions to be made based on it, are the responsibility of such third parties. The Consulting Team accepts no responsibility for damages, if any, suffered by any third party as a result of decisions made or actions based on this report.

Limitations

This report is intended as an indication of the visible or reported physical condition of the building components and is limited in scope to only those building components that are specifically referenced in this study. The material in this report reflects the consultant's best judgment considering the information available at the time of preparation.

The assessment is based on a visual review of the site, building structure, building envelope, plumbing,

mechanical systems, electrical systems, fire-life safety systems and interior finishes. Concealed areas were visually reviewed where access was provided or made readily visible. No physical or invasive testing was conducted.

Further, responsibility for detection or advice about pollutants, contaminants or hazardous materials is not part of the scope for this report. Mention of pollutants, contaminants, or hazardous materials in our report (if any) is to imply further testing by certified specialists is required. Trahan Architects suggests no expertise or responsibility for commentary about pollutants, contaminants or hazardous materials mentioned in our report.

Please note the following:

- No destructive testing was performed.
- No legal survey, soil tests, detailed structural engineering investigation or quantity survey compilations have been made.
- No attempt has been made to investigate the capability of the systems to handle actual heating and cooling loads.
- No testing of life safety systems including fire alarms was undertaken
- No quantitative measurements were taken of temperature, humidity, noise levels, and air pollutants.
- No attempt was made to start equipment that was not operating at the time of inspection.
- As noted in the report sections additional inspections, surveys and reviews are recommended.
- Accurate as-built drawings should be prepared of the existing building including architectural, mechanical and electrical.

Building History

Whitney Hall was constructed in 1905 and has a storied history as part of the Royalston community fabric. The building was constructed to provide school rooms on the first floor and on the second floor, a large hall with a performance platform at one end and a kitchen at the other. The building currently houses town offices on the first floor and storage on the second floor.

Construction Classification

Although some of the construction is concealed from view, in accordance with IBC Table 601 Fire Resistance Rating Requirements for Building Elements, the construction classification is determined to be Type VB with the following characteristics:

- Wood frame supporting floors and roof with columns in exterior wall and with interior columns
- Wood framed floor construction
- Wood frame with tie rods supporting the attic floor and a steeply pitched roof
- Interior non-load bearing partitions of wood framing

Summary of General Conditions

To our knowledge, no major repair intervention or maintenance work has been carried out to the building in recent years other than the installation of roof framing after a fire took place in the building.

Our visual observations conclude and confirm that the building's conditions with respect to its major envelope components including mechanical and electrical systems have been progressively deteriorating.

Site

The building is located across from Millers River, north of School Street at the corner of Pleasant Street.

A small parking lot is located at the rear of the building with a short route to the main entrance at the current location. The site around the car park will

need to be re-graded to provide accessible parking spaces and access to the building.

There is an available site to the west for potential development or expansion of the building should additional space be required. Trahan Architects did not review development options or provide planning advice as part of this report.

A dumpster is located off the rear parking lot and there is a truck turning area before entering the parking lot. There is no dedicated loading or waste management accommodated on site.

Parking

A parking lot is located in the rear, adjacent to a sloped walkway to an accessible rear entrance. A porch was added to the original structure at the north elevation to provide a covered walkway from the parking lot. The porch is supported by timber columns sitting on concrete footings and is in fair condition.

The front yard has the potential for the development of limited accessible parking and an accessible entrance in the front tower where the existing entrance doors are located. The basement level is directly accessible along the front for building services.

A second egress bridge to the side street (Pleasant Street) provides egress only for a limited part of the building. The egress bridge has fallen into decay and does not meet code or accessibility requirements. The bridge should be addressed immediately to avoid any potential life-safety issues.

Building Exterior

The building is approximately 3-stories high, including an exposed basement along the south elevation. A tower feature, centrally located on the south elevation, houses the primary circulation stairs for the building.

The building's exterior is clad in wood siding in lap or clapboard style panels, featuring long horizontal boards. It is unclear the age or species of the wood siding. Protected areas under porches were generally in good shape, but wood boards exposed to elements displayed decay and rot areas. Portions of the building envelope, specifically on the tower's east side, are showing great deterioration and immediate replacement is recommended. Multiple layers of paint are seen on many surfaces, and other surfaces display paint peeling or fully removed. Restoration or new wood cladding should be considered.

Windows are framed with a wood surround and have been retrofitted with double hung vinyl windows on the first floor and the second floor.

Wood windows are located on the upper attic level – the windows were not checked for operability. The glass appeared to be single glazed. Some glass panes in the windows at the attic level are stained glass of various patterns and colors. There are broken panes of glass at this level. Immediate replacement of broken glass is recommended.

Access to the roof could not be accommodated, therefore a visual review from surrounding areas was undertaken. The roof is clad in asphalt shingles with an aluminum gutter system installed at the roof edges that drain below grade.

The building has two chimney stacks visible on the exterior of the building. The interior chimney conditions were not reviewed, and it is unclear if they are operable or need to be cleaned. The brick was in good condition with a few areas requiring repointing visible from the street.

The building envelope is in fair condition. The siding is anticipated to be salvageable and workable. Although the long-term maintenance of the wood siding is not desirable there is some benefit to maintaining the original cladding material of the building.

The recommendation is for replacement of the doors and windows with energy efficient wood windows and doors.

There are numerous locations in the building that display water damage. It is unclear if damage was caused from interior water leaks (from drains, or supply pipes) or from exterior elements. A detailed assessment of the building enclosure should be made to reduce possibilities of water infiltration and damage to the building.

Building Interior

All primary rooms have been reviewed. Minor rooms such as closets, storages and similar spaces have not been reviewed. Where possible, images of elements and conditions have been attached.

There are elements throughout the building interior that demonstrate historic character, such as millwork and door hardware. Some of these historic elements have been painted or otherwise covered since the building's original construction. There is value in maintaining these elements and consideration should be made to retain or restore them. A historic preservation report should be conducted.

Interior architectural elements including wall bases, doors and door hardware, etc. in most instances date back to the original building construction and as such, have simply worn down and deteriorated due to continuous use and traffic. Other architectural elements original to the building have performed better simply because they are not directly impacted by day-to-day use, wear, and tear.

Basement

The basement level is in fair condition. There was evidence of three different foundations used. Concrete Masonry Unit (CMU), Brick and Stone. The CMU installation seemed to be installed most recently, and the visible wall's condition was in decent shape. It was unclear if any reinforcing was used or steel support.

No perimeter water proofing or drainage is expected given the foundation's age. Trahan was unable to view

any portion of the foundation wall from the exterior side. There was evidence of water infiltration and efflorescence on the stone surfaces.

The brick foundation had locations where mortar was missing or crumbling between bricks. Some bricks displayed evidence of excessive moisture through decaying brick. Some of the bricks had evidence of painting and may be trapping water.

The recommended long-term solution is to ensure that the foundation does not allow any penetration of water. Investigate the cost/benefit option of installing a proper vertical wall drainage system connected to the existing sub-drainage/weeping tile system so that water will not collect, pond, and penetrate in the foundation concrete walls or erode the soil at the base of the footings. The new wall drainage system will relieve the existing walls from the soil pressure as the main cause of water and vapor being driven from the exterior to the interior.

Note: A new wall drainage system would be a considerable investment and it would be a feasible option only for those locations where it can be effectively installed i.e., exterior perimeter of exterior foundation walls. In situations where it is not practical to apply a new waterproofing/drainage system to the outside of the construction an interior applied system of waterproofing is still the most cost-effective option.

12"x12" floor tile was used on a portion of the basement floor, so a review of the structural floor condition could not be made comprehensively. Areas at the perimeter of the basement had drywall removed to expose the edge conditions. It appears that a concrete slab, or topping slab was put in place. In other locations, a brick floor was in place.

The ceiling structure was made from rough sawn timber with joists at approximately 12" on center – the species of wood was not clear – however the timber seemed dry and in good condition. There are some locations with timber columns with brick base plate support. The brick at the base was eroding and should be reviewed.

Light gauge metal framing was used for wall support in some areas of the basement – some of the framing was cast into concrete slabs on grade and is displaying a sign of rust and deterioration at the base. The framing is non-structural.

The basement would be best suited for building systems and storage (if proper moisture mitigation strategies are implemented), due to the limited accessibility, clearances, and access to circulation.

Building Systems

Structure

The first floor is made of rough wood and steel columns with natural wood beams (members not milled). These structural members are exposed at the Basement Level. Wood board subfloor spans the non-milled beams. Further evaluation of the structure is recommended to verify load capacity.

The second-floor framing is anticipated to be adequate for occupancy because the building has functioned with an assembly space on the second floor. The floor structure of the second floor is not exposed and was not reviewed during this assessment. During structural evaluation, the floor structure should be evaluated to verify load capacity.

The auditorium space includes a wood floor, wood stage, plaster walls and ceiling tile. This space is column-free, meaning the ceiling structure is spanning from exterior wall to exterior wall at this level. The ceiling structure of the second floor is not exposed and was not reviewed during this assessment. The room is in good condition. The space is currently used for storage of documents and emergency beds.

The third floor is not adequate to support occupant load without reinforcement. The third floor is made of wood boards transversing supporting joists and girders suspended by tie rods from the roof beams.

The roof framing is exposed at the attic. Rafters span from the north and south exterior walls to a single ridge beam, connected by regular collar ties. There is evidence of a past fire at this level and all affected framing and sheathing has been sistered or replaced. Steel pipe columns are exposed at the Basement Level and Level 1. It is unknown when these columns were installed. These columns appear to be free of damage or rust. Un-milled wood columns are also exposed at the Basement Level. These columns appear to be dry and free of rot. Further evaluation is recommended.

The recommendation is to reinforce the floor framing and the roof framing to support the loading capacity required for any new use or modifications to the building. The framing on the third floor would need to be upgraded to support any intended use. The third-floor space is not insulated or served by building systems and would need to support occupancy at this level.

Fire Suppression

There is no fire suppression system. The building code mandate is to provide an automatic fire suppression system throughout that reports through a fire alarm system. A dry system is recommended that provides full coverage including the attic above the third floor.

Plumbing

The plumbing system is not adequate. The recommendation is to provide a full plumbing system beginning at the water service entrance and the sanitary sewer service outlet. The washrooms, only located at the basement level, are not accessible and should be upgraded to meet code requirements. Some of the water closets are not currently in use. There is evidence of recent plumbing work done on the main drain line at the basement level.

Mechanical

The mechanical systems are nearing the end of their useful life and do not provide fresh air. The recommendation is to provide heating and air conditioning throughout the building with energy

recovery ventilation for fresh air and ventilation.

Two large oil tanks are in the basement. Future mechanical systems should look to replace oil supply and carefully dispose of oil tanks.

Electrical

The electrical system is not contemporary, and, in some areas, is in an unsafe condition. It is recommended to be replaced, including all interior wiring and receptacles. With the incorporation of air conditioning and an elevator, an upgraded three phase electrical service is recommended with an underground service entrance with spare conduit for future services. The building would benefit from a generator.

Lighting

Portions of the Basement Level include fixtures with fluorescent T8 lamping, while other areas have linear light fixtures in a ceiling grid. At Level 1, the lighting fixtures are placed in a ceiling grid with energy efficient LED light lamps. Determining the type of lamps used in all locations of the building would require further inspection. Overall, the lighting is of inadequate quality and there is insufficient illumination along paths of egress and areas to meet Code requirements. All fluorescent fixtures should be upgraded to LED fixtures where they still exist. Exit signs and egress lighting should be provided throughout the building.

No emergency generator is on site. Emergency lighting is achieved via emergency battery units, remote emergency light heads.

Use and Occupancy Classification

The existing building is a mixed-use building without separations consisting of Business Group B throughout except for the second-floor meeting room which is Assembly Group A3.

In determining the Use Group for any future use, consideration could be given to the Use Group which most nearly resembles the current occupancy characteristics and relative hazards to life safety that occur in the portion of the building being altered. Aligning future use to the current occupancy classification is potentially the most economical solution and less complicated for new construction, however, is not necessary or required.

Barrier-Free Accessibility

The scope of this site assessment excludes an in-depth review of barrier-free accessibility. It is noted that this building was designed and constructed prior to stringent barrier-free requirements being introduced into local building codes. For the most part, barrier-free accessibility requirements are not retroactive and Royalston will not need to comply to such requirements unless renovations are planned.

We note that the building's ground floor is only partially barrier-free accessible, and there are several major deficiencies such as:

- Insufficient number (and general configuration/design) of accessible public washrooms
- Insufficient clearance from doors and door's widths in barrier free path of travels
- Incorrect door hardware

Recommendations aimed at rectifying existing, nonconforming conditions are outside the scope of this report as they would require detailed in-situ measurements and the development of design options to determine a feasible approach and a viable, cost-effective solution.

The rear entrance is barrier-free accessible; however the designated, barrier-free parking space does not meet ADA requirements as it does not clearly indicate the space and service aisles. Parking signage should be adjusted for visibility.

At present full accessibility is impaired by several

factors; the principal is related to barrier-free washrooms. Existing washrooms are not barrier-free accessible as per current standards and regulations; particularly regarding the minimum required number of stalls, type, design and location of fixtures, vanities, type, and mounting height of washroom accessories, etc.

Doors are not provided with adequate barrier-free hardware and there is not adequate clearance from door swings, along corridors and barrier-free paths of travel for proper wheelchair use.

The building does not have an elevator; an elevator with a stop at grade and at each floor is recommended. Also recommended is a vertical wheelchair lift to access the presentation platform in the large meeting room on the second floor if maintained.

In regard to the Building Code analysis there are several non-compliant conditions that will require further detailed review to confirm compliance alternatives or to confirm if an existing non-compliant condition can be grandfathered by the authority having jurisdiction.

Hazardous Materials

The site assessment report does not include review of hazardous materials. The Owner shall be responsible for identifying hazardous materials not concealed within existing construction and for reporting their presence to a Contractor prior to the start of any construction on the building.

We recommend testing and remediation of lead paint throughout the building.

Summary

Every building is unique and the need for maintenance, repairs and asset renewals varies depending on many factors, including use of the building, the quality of construction, design details, exposure and environmental conditions, and the standard of care given by the owner and facility management team.

There is evidence that funding for principal asset renewal, maintenance or replacement was not adequately established. This has contributed to the accelerated deterioration of major building components and systems that are long past the end of their useful service cycles – as we observe today – that require replacement.

A program of maintenance is recommended to be developed for the facility. Immediate repairs – when reported and addressed, should be carried out on an as-needed, reactive basis. A budget should be considered for an ongoing program of building maintenance and repairs.

The site assessment acknowledges the limitations of Whitney Hall from lack of building maintenance and required building upkeep over years, along with the lack of universal accessibility, fire suppression, and life safety and overall condition of the building.

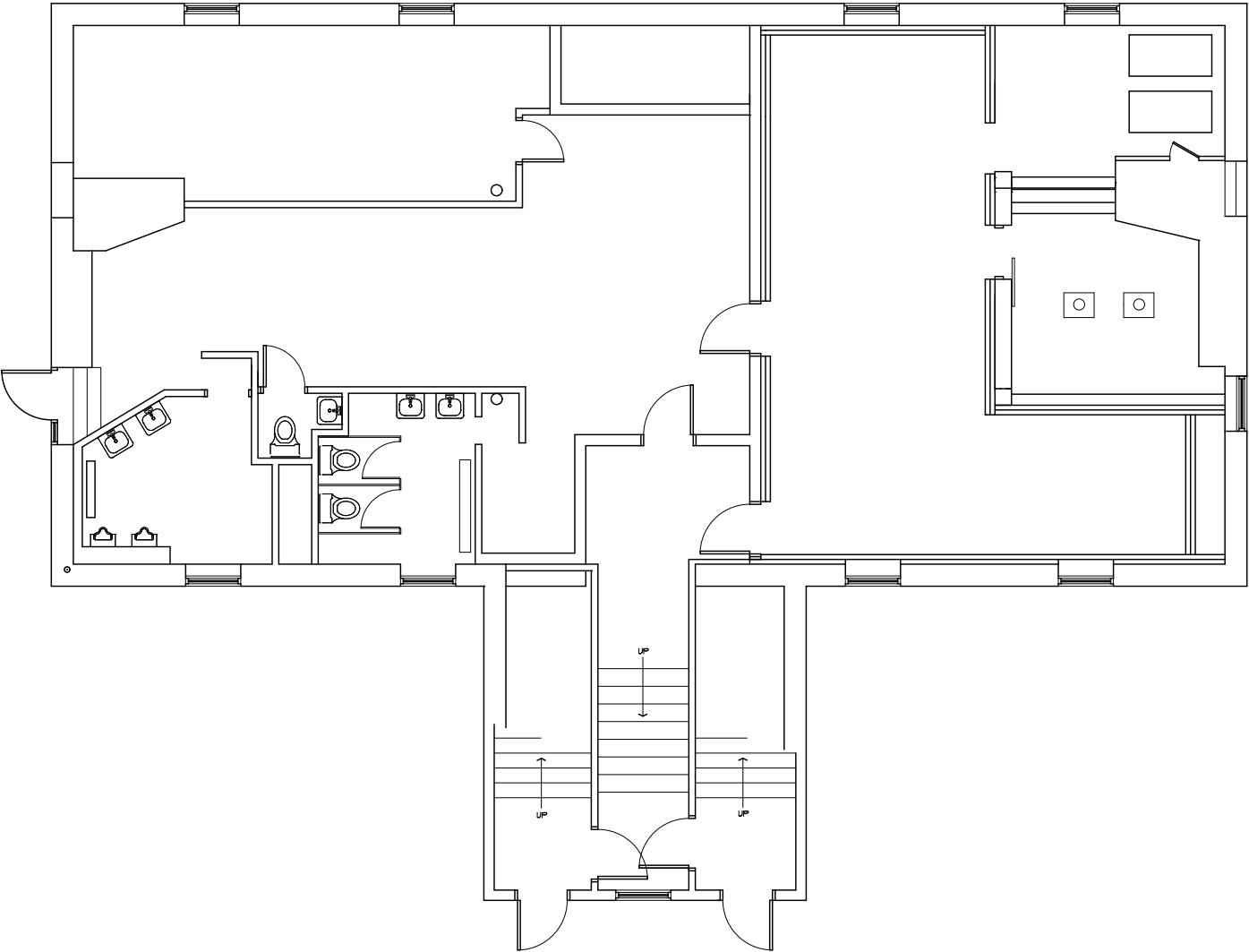
Significant improvements would be required to bring the building up to date with accessibility standards. Upgraded building systems and structure should be assessed in further detail and considered in all circumstances.

Considering the age, history of past repairs/upgrades, and based on the evidence gathered from our surveys and investigations, we can confirm that the current conditions of Whitney Hall are rated at the end life cycle and will require a large and expensive asset renewal project to occur. Significant funds will need to be reinvested in the building and the standard operating budgets will need to be revisited.

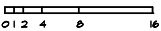
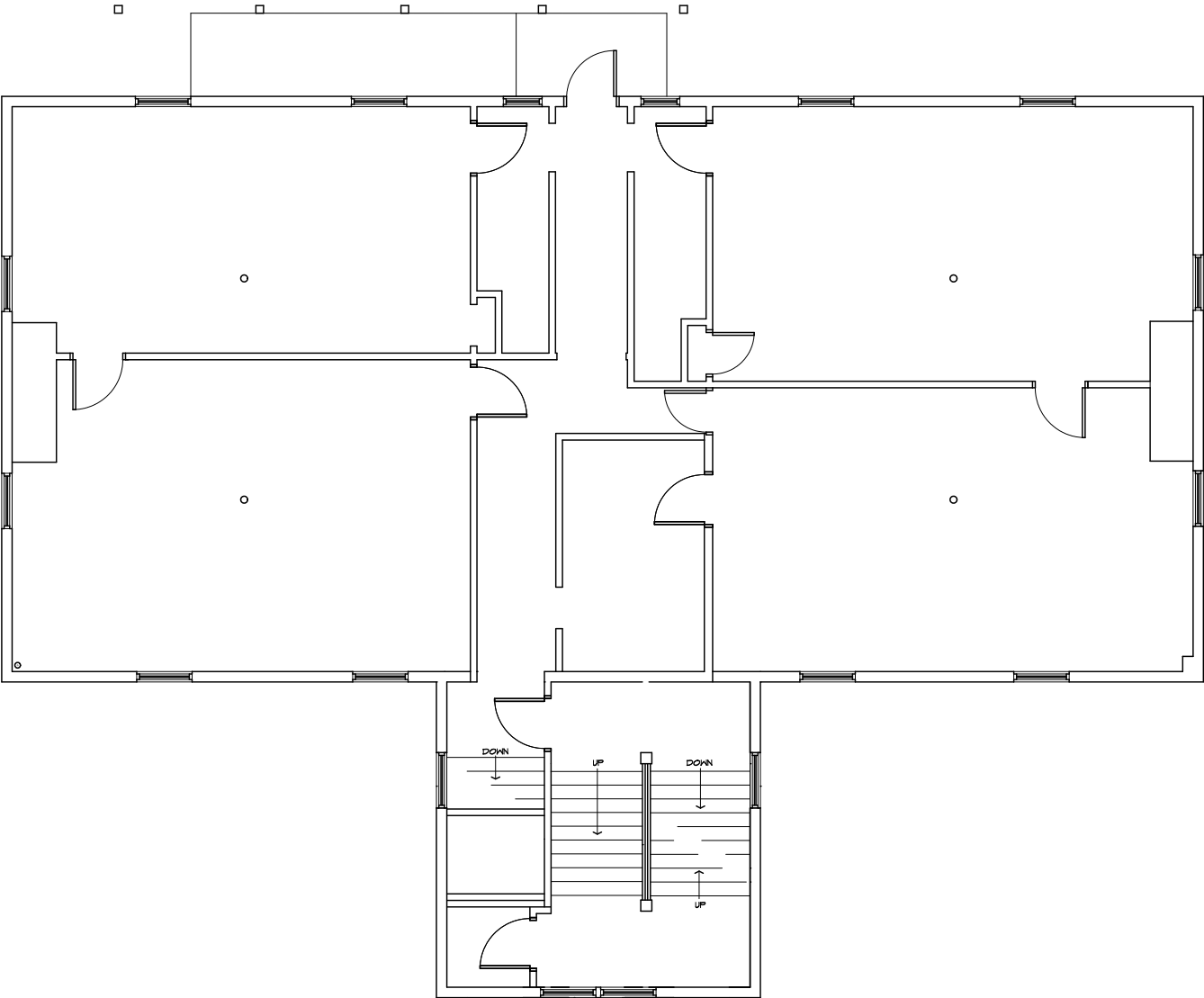
Existing Drawings

Existing Floor Plans

Basement Level

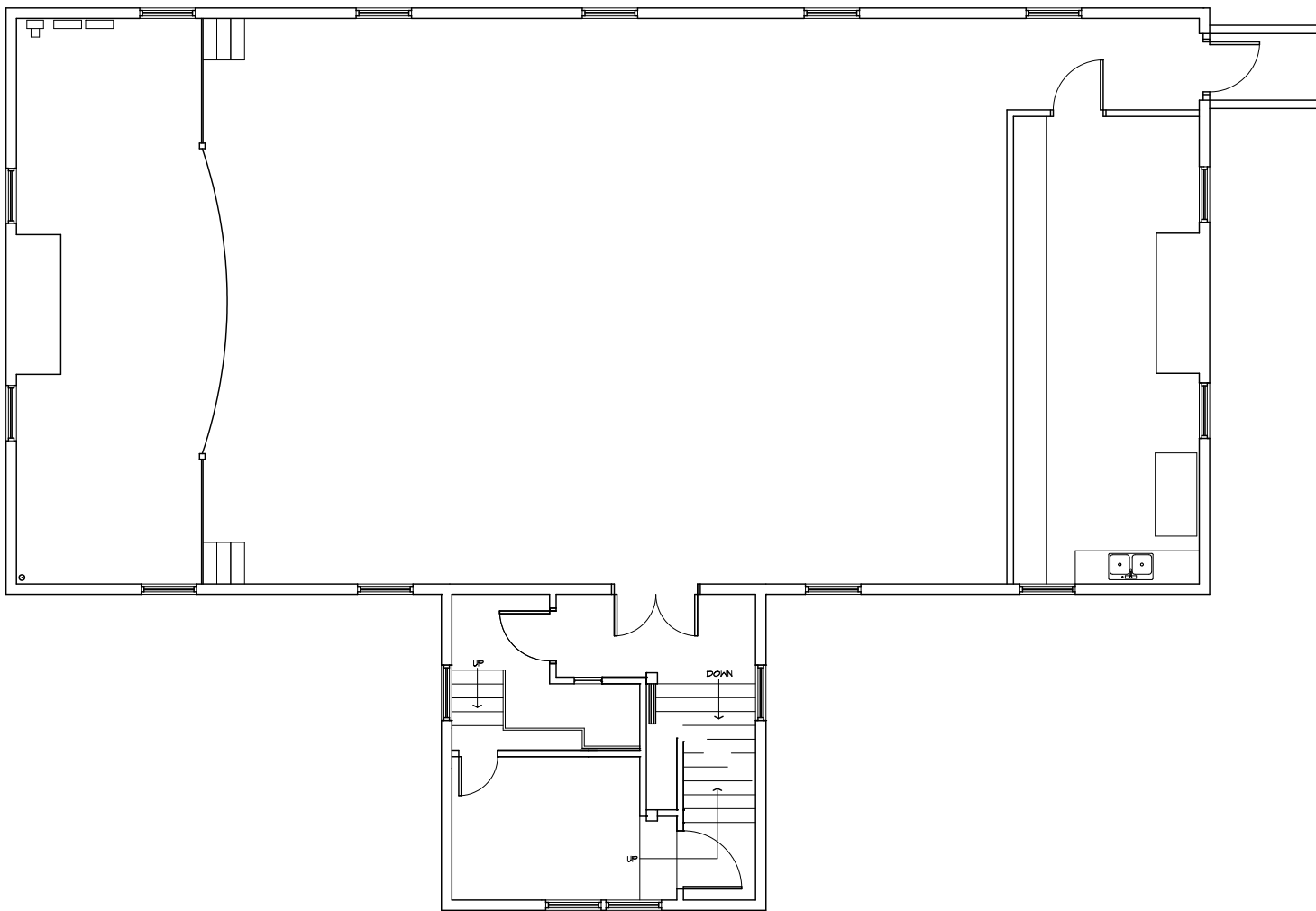


Level 1

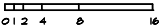
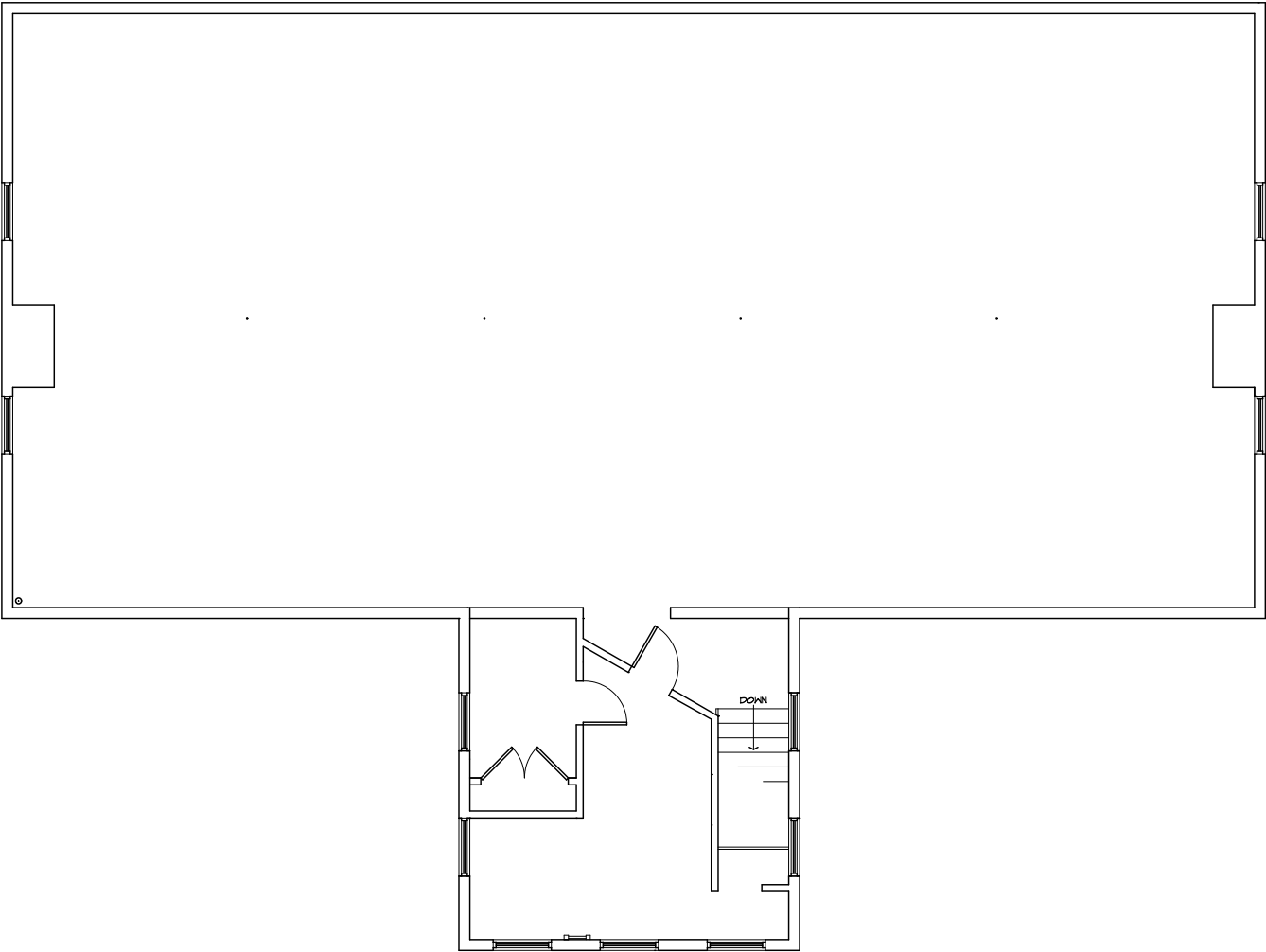


Existing Floor Plans

Level 2



Level 3 (Attic)



Existing Exterior Elevations

School Street Elevation (South)



West Elevation



0 2 4 8 16

Existing Exterior Elevations

North Elevation



Pleasant Street Elevation (East)



0 2 4 8 16



A.



B.



C.



D.

A.

Tower wood siding exhibiting excessive peeling and deterioration at gutter.

B.

Plaster in ceiling and wall separating from lath and paint peeling at main stair; Interior view of deterioration exhibited in Figure A.

C.

Basement interior metal framing is rusting at floor. Basement was dry at the time of analysis.

D.

Staining of ceiling exhibited at Level 2 kitchen. Dry at the time of analysis.

E.

Main entry view from School Street. Excessive paint peeling at both entry doors and wood siding at stair. Paint peeling from wood siding on all sides.



E.



A.



B.



C.



D.

A.

Ramp connecting Pleasant Street and Level 2 is in unsafe condition and should not be used. Ramp does not meet accessibility standards. No barrier-free access to Basement Level, Level 2, or Level 3.

B.

Ramp at rear porch to Level 1 in fair condition.

C.

View from left entry door along School Street. Stairs up to municipal offices. Entry into facility from School Street is not barrier-free.

D.

View from right entry door along School Street. Stairs up to Level 2. Entry into facility from School Street is not barrier-free.



E.



F.

E.

Stair to West entry door.
Access to Basement Level is not barrier-free and does not meet Code requirements.

F.

View from center window between entry doors to basement stair. Access to Basement Level is not barrier-free.

G.

View of washrooms at Basement Level. All facility washrooms are at the Basement Level, which does not have barrier-free access.



G.



Kitchen at Level 2



A.



B.

A.
Washroom lavatories functioning at time of assessment. Concrete floor exhibiting deterioration.

B.
Washroom not currently in use. Functionality of water closets and lavatories was not assessed.

C.
Water closets at Basement Level. Functioning at time of assessment.



C.



A.



B.



C.



D.



E.



F.

A.

Non-milled timber exposed beams at Basement Level, spanning from stone foundation to interior columns.

B.

Connection between non-milled timber exposed beams to milled timber girder at Basement Level, spanning from stone foundation to interior columns.

C.

Non-milled timber column at Basement Level.

D.

Steel pipe column at Basement Level.

E.

Steel pipe column at Level 1.

F.

Steel pipe column at Level 1.

G.

View from stage at Level 2. Column-free space.



G.



A.



B.



C.



D.



E.

A.

Charred rafters sistered with solid wood rafters at Level 3 Attic, spanning exterior wall to ridge to exterior wall with solid wood collar tie.

B.

View of Cupola interior; Exposed wood rafters and roof decking.

C.

Window at Level 3 Attic exhibiting some broken glass.

D.

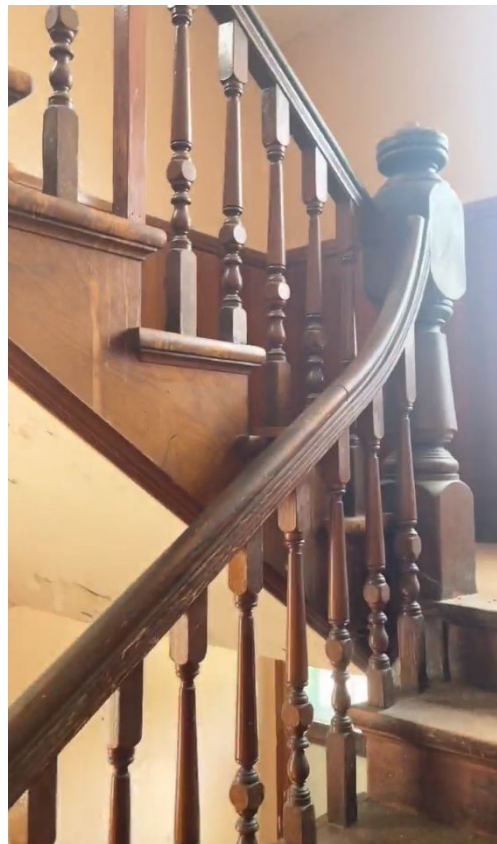
Wood window at Level 2 in Tower.

E.

Stage platform at the west end of Level 2, featuring wood paneling, hardwood flooring, and decorative wood trim.



F.



G.

F.

Operable Box Office window at Level 2.

G.

Solid wood stair, rails, + balusters at main stair connecting Level 1 + 2.



A.



B.



C.



D.



E.



F.



G.



H.

A.

Painted solid wood handrail and painted handrail bracket at stair connecting School Street Entry to Level 1.

B.

Door hardware at Level 1.

C.

Painted wood paneling missing trim at Level 1 back entry corridor.

D.

Painted door and trim with door closer.

E.

Painted built-in millwork, covered by acoustic tile ceiling with missing tile at Level 1. Water stained ceiling above.

F.

Plaster ceiling with peeling paint at School Street entry.

G.

Ceiling at Level 3. Staining

H.

Acoustic tile ceiling; Painted plaster and wood panelling on walls; Carpet flooring at Level 1.

Thank you.

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