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**FRIENDS OF THE FARMS**  
**HISTORIC SUYEMATSU FARMSTEAD PLANNING PROPOSAL**  
**September 6, 2016**

## **1. INTRODUCTION AND BACKGROUND**

This proposal is in response to a request by Morgan Smith, Deputy City Manager of the City of Bainbridge Island, for the creation of an **Implementation Plan** for capital improvements at the Historic Suyematsu Farmstead. The designated historic farmstead is a 5-acre portion of the 26-acre Suyematsu-Bentryn Family Farms. Following a study by the Historic Preservation Commission, the Bainbridge Island City Council designated the Suyematsu Farmstead a Historic Area in 2016. Friends of the Farms manages the 26-acre Suyematsu-Bentryn Family Farms under a 30-year lease with the City of Bainbridge Island. The lease terminates on January 1, 2042.

The scope of work described in this proposal for the 5-acre historic farmstead will dovetail with concurrent master planning work being undertaken by Friends of the Farms for the remaining 21 acres of Suyematsu-Bentryn Family Farms property, with the objective of completing complementary plans in the summer of 2017.

Friends of the Farms has assembled a team of knowledgeable and skilled professionals with both local and national experience to create an Implementation Plan designed to transform the historic Suyematsu Farm property into a valued community, historic, and agricultural resource.

## **2. OBJECTIVES**

The City of Bainbridge Island wishes to assess and address capital improvements at the Historic Suyematsu Farmstead. Objectives include:

- Preservation and interpretation of historic farm structures, landscapes, and histories
- Repair and improvement of the properties to accommodate preservation, interpretation, and agricultural use, as well as needed support functions
- Securing significant artifacts from the site and cataloguing them for future analysis, interpretation, or display
- Possibility of on-site housing for farm workers or interns
- Sustaining public value, vibrant activity, historic interpretation, and agricultural output at the farm for decades to come.

Achieving these objectives will require clarity of vision, detailed input from a variety of stakeholders, and a robust, concrete **Implementation Plan** that outlines proposed activity, management structures, funding issues, and operational costs as well as capital needs and design concepts.

The Implementation Plan will guide subsequent fundraising and construction implementation work.

### 3. PROJECT APPROACH

The project approach below was developed by KO Projects in consultation with Friends of the Farms, the Bainbridge Island Historical Museum, and the City of Bainbridge Island.

The project will proceed in three phases:

#### Phase 1: A Plan for the Future

Building on a process of stakeholder engagement, research, and analysis, this phase would culminate in an Implementation Plan, including a timeline, budget, management and operating plan, and capital project concept to guide future work.

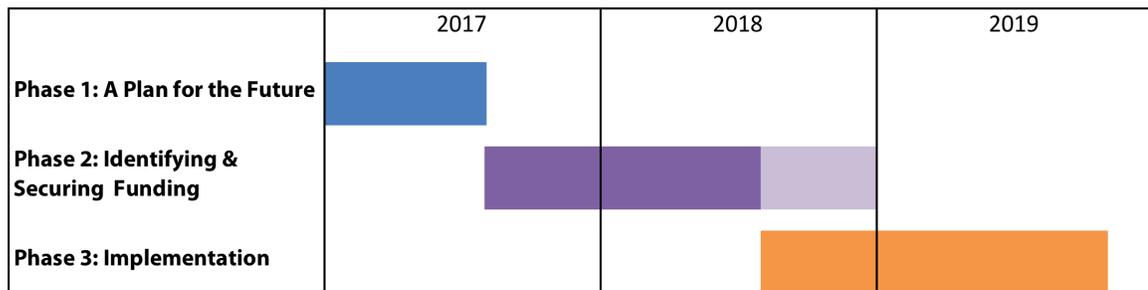
#### Phase 2: Identifying & Securing Funding

Using the Implementation Plan as a case for support, in this phase project partners would identify and secure funding for the proposed project(s). This work could be undertaken by fundraising consultants, project partner organizations, or a combination.

#### Phase 3: Implementation

Construction and other projects would be managed during a final implementation phase, using the Implementation Plan as a guide.

To complete construction by late 2019, we recommend that initial planning begin in early 2017, followed by fundraising in summer 2017 continuing through project implementation. Construction implementation could begin in mid-2018, assuming the availability of adequate funding.



The scope of work below is for Phase 1 work. Descriptions of Phases 2 and 3 are included in Appendix A and would be refined during Phase 1.

### 4. SCOPE OF WORK

#### Phase 1: A Plan for the Future

Phase 1 work will be led by consultants KO Projects, working directly with the project Leadership Team for tasks 1.1 through 1.7.

##### 1.1. Review Existing Documentation

- a. **Review relevant materials** including historic preservation studies, building assessments, past City farmland studies, lease and operations agreements, etc., and tour the site.

Examine the marketplace to understand local demographics, visitor behavior, and relevant nearby sites or attractions.

- b. **Conduct a kickoff workshop** with project Leadership Team (ideally a group of 6 or fewer) to:
  - Confirm project approach, timeline, and goals
  - Identify key stakeholders for initial input
  - Inventory use possibilities and capital improvements that have been considered to date
  - Define the purpose of the planned capital improvements to guide decision-making through the planning process.

## 1.2. Stakeholder Input

- a. **Conduct individual or small-group stakeholder interviews** to solicit input, identify use opportunities and related facility needs, and understand community sentiment about the farm and proposed improvements. Subjects for up to 20 interviews include:
  - Farmers, including but not limited to those that presently use the site
  - Site neighbors and potential users
  - Selected community leaders including philanthropists, policymakers, and business leaders
  - Representatives of potential partner organizations including the Historic Preservation Commission, Friends of the Farms, Bainbridge Island Historical Society, EduCulture, Bainbridge Island Japanese American Exclusion Memorial, Bainbridge Island School District, Bainbridge Island Metro Park & Recreation District, etc.
- b. **Host a stakeholder roundtable** to review input and findings to date, consider key issues, and discuss emerging concepts. Invitees would be drawn from the pool of interview subjects, in addition to City and project partner leadership.
- c. **Engage stakeholders in the planning process** with sessions at the midpoint and end of Phase 1 planning. There are a variety of formats for disseminating information about project progress to stakeholders and citizens; we look forward to refining an approach to this with you.

## 1.3. Learning from Others

- a. **Gather aspirational examples** of exemplary projects and programs to provide common reference points and planning inspiration. These examples might include innovative approaches to farm worker housing, effective community agriculture education partnerships, or even successful designs for year-round farmstands.
- b. **Identify and examine several comparative sites** to gather data and identify best practices for the effective operation of publicly owned historic farm properties. Compile activity and use information, profile management and governance structures, and examine operating revenues and expenses. Consider relevant capital improvements, their costs, and outcomes, if applicable.

## 1.4. Workshop: Envisioning the Future

- a. **Conduct workshop with project Leadership Team** to review findings and stakeholder feedback, and consider use and improvement scenarios. Examine and prioritize opportunities using goals identified at the project's outset. Identify a preferred scenario for site use and capital development.

### 1.5. Operations and Use Analysis

- a. **Outline proposed annual activity** at the site, based on the project scenario identified in the foregoing workshop. The outline would address seasonality, functional requirements, and operational impact.
- b. **Define key management and operational structures & range of potential budget requirements**, including: division of responsibility between the City, Friends of the Farms, and other partners; staffing and management requirements; revenue and expense categories; funding mechanisms for building stewardship; and the range of earned income and annual operating support that may be required.

### 1.6. Deliverable: Implementation Plan

- a. **Define capital project scope** including the type and extent of improvements required for the property, the Barn, the Farmhouse, other structures (e.g. Picker Sheds, Workshop, and Office), site/landscape amenities, and, as required, the extent of new construction.
- b. **Identify range-of-magnitude capital costs**, using industry data, comparative projects, and input from local builders. These estimates would also include provisional allowances for project-related soft costs such as design, permitting, project management, etc., as well as consideration of historic preservation issues and interpretive elements as required.
- c. **Outline a management and operating plan**, using findings from the Operations and Use Analysis. This portion of the plan would describe planned activity, management structures, and budgetary frameworks, including potential for earned revenue and need for support.
- d. **Create a project timeline and implementation plan** to guide fundraising and construction. This would be influenced by the projected availability of capital, the urgency of needed repairs, and the projected use of existing and proposed structures. The plan would outline implementation tasks and responsibilities, as well as recommended phasing and prioritization for capital projects.

### 1.7. Workshop: Plan Review

- a. **Review draft Implementation Plan** in a workshop with project Leadership Team. Key economic drivers, agricultural and community use issues, and capital topics would be reviewed and discussed. Relevant risks, unknowns, and opportunities would be considered, and immediate next steps identified.
- b. **Finalize Implementation Plan** incorporating feedback and adjustments resulting from the workshop.

### 1.8 Historic Material Inventory & Recommendations

Bainbridge Island Historical Museum will work concurrently with other Phase 1 tasks to:

- Organize and inventory contents of Workshop, Office, and Picker Sheds
- Recommend steps needed to secure contents in the short-term
- Deliver written recommendation for long-term disposition of contents of Workshop, Office, and Picker Sheds

#### **Note: Leadership Team**

At the outset of Phase 1, a small Leadership team will be established to act as the project's decision-making body. This team of up to 6 individuals will be comprised of selected community leaders,

representatives of partner organizations, and/or other important stakeholders, and will be selected by mutual agreement of the City of Bainbridge Island, project consultants, and project partners.

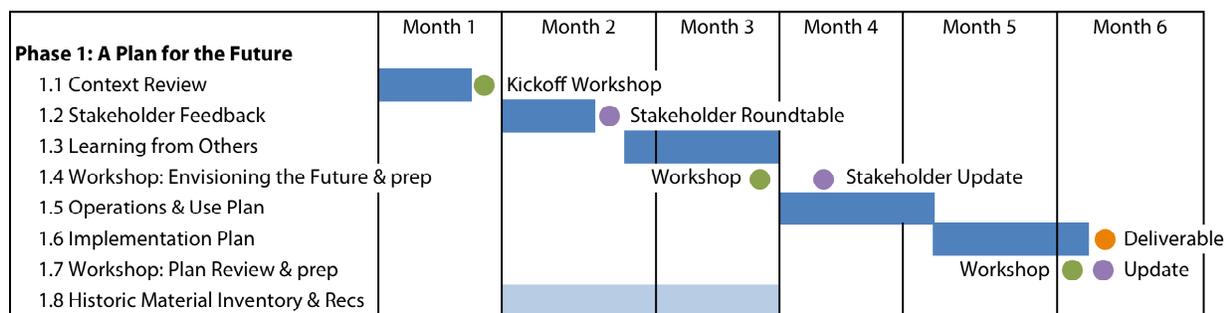
**Note: Design Concepts**

If projects being considered include significant new construction, it may be necessary to engage a design team to produce preliminary concepts. This could take the form of a design competition or other public process, or could be a quick exercise to develop schematic ideas and inform capital cost estimates.

Design fees, if needed during task 1.6, could range from a small honorarium in the case of a design competition, to several thousand dollars if a more complete schematic design is required. During Phase 1 consultants will advise project leadership on the extent of design services needed, and assist in identifying appropriate candidates, and associated costs. Design team fees, if needed, are not included in this proposal.

**5. TIMELINE**

Phase 1 tasks will proceed according to the timeline below. As appropriate, stakeholder input and updates could be aligned or combined with Friends of the Farms master planning, and/or with other public meetings.



**6. PROJECT TEAM**

Friends of the Farms will be the primary contact for the process of generating an Implementation Plan for improvements to the Historic Suyematsu Farmstead, and will hold the main contract with the City of Bainbridge Island. Subcontractors, listed below, will contract with Friends of the Farms. Executive Director Heather Burger will act as Project Manager, with assistance from others as needed. Friends of the Farms will provide administrative and logistical support to the project leadership team including:

- Monitoring the work of the Leadership Team and providing status reports to the COBI Deputy City Manager
- Planning and organizing project leadership team meetings, stakeholder interviews, and community workshops
- Disseminating information to the project leadership team, partner organizations, stakeholders, to consultants, leadership team, partnership organizations, and the community at large
- Administering project contracts and payments

KO Projects (Katie Oman with Bill Moskin) will lead project consulting work and perform tasks 1.1 through 1.7 described in the scope of work above.

The Bainbridge Island Historical Museum will perform task 1.8 described in the scope of work above.

**7. PROJECT FEE**

The fee, inclusive of expenses, for Phase 1 will total \$49,640 according to the table below:

KO Projects	\$43,000
Bainbridge Island Historical Museum	1,640
Friends of the Farms	5,000
<b>Total Project Fee</b>	<b>\$49,640</b>

## APPENDIX A Phases 2 & 3

Below are recommended approaches to fundraising and implementation work. These tasks could be undertaken by a combination of consultants, program partners, volunteers, and other contractors. A more detailed framework for these phases would be developed as part of Phase 1.

### Phase 2: Identifying & Securing Funding

No matter the scale of improvements considered at the Historic Suyematsu Farmstead, it will be imperative to develop a comprehensive fundraising plan for capital, operations, and endowment funding that: identifies key responsibilities; clear goals, timeline and budget; as well as funding opportunities and strategies in a variety of sectors. The approach to fundraising would likely be structured in three areas:

- **Institutional Support**  
**Identify potential funding opportunities** from foundations, service organizations, and commercial sources. Solicit feedback from institutional funders and pursue opportunities in collaboration with project partners.
- **Individual Support**  
Solicit feedback from key supporters to **assess major gift possibilities**. Once several major gifts have been secured, a broader-based public fundraising campaign could be undertaken as needed.
- **Public Support**  
**Identify avenues for public support** of both capital and ongoing operations at the Historic Suyematsu Farmstead. Timing and lead-time for public funding opportunities at local, state, and federal levels should be considered, as well as the possibility of leveraging City resources during project implementation.

### Phase 3: Implementation

The scope, timing, and responsibility for implementation-phase work will depend on the outcomes of Phase 1. Beyond the tasks associated with construction and repair, there will be a need for project and fiscal management, development of detailed pro forma operating estimates, public messaging and engagement, and interfacing with site users as their activities are impacted by the work. These issues will be addressed as part of the Implementation Plan developed in Phase 1.

### COST

Because the scope and scale of the project will be defined during Phase 1, it is difficult to estimate project costs associated with Phases 2 and 3 until planning work is under way. It is probable that other team members would need to be engaged, including but not limited to fundraising consultants, construction cost estimators, architects & design consultants, and contractors.

The associated costs can vary considerably according to the scale of the project being considered. In this case, unless capital costs approach the high seven figures, we anticipate that project partners could use existing networks and knowledge to assess capital fundraising goals and a full-blown fundraising study may not be required. Costs associated with fundraising implementation, as well as project management, construction, publicity, etc. would be estimated during the latter part of Phase 1.

## APPENDIX B Qualifications

**Katie Oman** LEED AP, cSBA



Katie Oman is an expert in project planning for arts, culture, and heritage organizations with over fifteen years' experience in design management, decision-making, and economic analysis for nonprofit- and public-sector clients across North America. Her approach combines deep technical expertise in the complexities of capital planning and development with a sensitivity to the unique needs, values, and aspirations of nonprofit organizations, stakeholders, and their communities.

She has a special expertise in sustainable development for arts, culture, and heritage using data-driven analysis and research to move towards new long-term approaches to community cultural infrastructure planning. Katie's past positions include two years as Director at AMS Planning & Research, a national management consulting firm working in the arts, culture, and heritage sectors.

Katie holds a degree in Architecture from Princeton University and a Master's in Public History and Cultural Heritage from Trinity College Dublin where her graduate work with the National Museum of Ireland created a new model for the ongoing costs of heritage collection stewardship. She teaches the Cultural Infrastructure and Facilities course in Seattle University's MFA in Arts Leadership, is a LEED-Accredited Professional, and a Certified Sustainable Building Advisor.

### Selected Projects

#### **Oliver H. Kelley Farm Capital and Economic Analysis**

*\*these projects were completed while with AMS Planning & Research*



Comprehensive activity, operations, and capital planning for 189-acre historic farmstead operated by Minnesota Historical Society to inform the construction of a new Visitors Center on site. The new Center will include classrooms, a commercial kitchen, and interpretive space; site and historic buildings upgrades will facilitate new partnerships for the site's agriculture programs.

#### **Historic Fort Snelling Capital, Economic, and Operating Plan**



Detailed economic analysis, staffing and management plan, revenue analysis, and operating pro forma for the 300-acre historic site, in consideration of an expansion in the types of programs, partners, and attendees the site hosts. Deep involvement in capital project decision-making in the context of historic preservation, helping proposed uses inform architectural decisions to create a sustainable project plan.

#### **Mercer Island Center for the Arts Project Planning & Analysis**



Close collaboration with MICA's board of directors to plan a new arts center on Mercer Island. Work included operating and use analyses, design and construction team management, project cost planning, economic impact analysis, public presentations, and development of key messages regarding community impact and value.

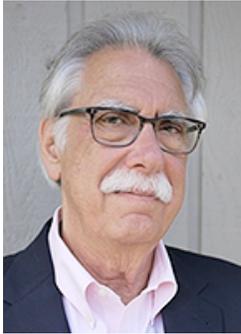
#### **City of Redmond Cultural Facilities Study**



Holistic, phased study to evaluate the need for and potential use of community cultural infrastructure in Redmond, and create an operating plan to guide implementation of a selected capital project. The study's work included extensive interviews and stakeholder input, detailed use analyses, comparative studies, public presentations and close collaboration with City staff and policymakers.

## APPENDIX B Qualifications cont'd

### Bill Moskin, cSBA



Bill Moskin is a cultural planning consultant with extensive national experience in community and organizational planning, fund raising, and cultural tourism. Bill has been active in the arts and culture field for over forty years. As Principal of Bill Moskin & Associates, he served government, foundation and nonprofit clients for over twenty-five years. Currently Bill is an adjunct faculty member for Seattle University's MFA in Arts Leadership, co-teaching Cultural Infrastructure and Facilities.

Before pursuing consulting on a full time basis in 1987, Mr. Moskin spent nine years with the City of Sacramento as the Executive Director of the Metropolitan Arts Commission and then as the Development Officer for the Department of Parks and Community Services. Prior to arriving in Sacramento in 1978, Mr. Moskin managed the Margaret Jenkins Dance Company in San Francisco.

Bill Moskin has authored/coauthored numerous nationally distributed publications including two Monographs for Americans for the Arts: *The Arts in Transition: Preparing for a Sustainable Future*, June 2007 and *From Stability to Flexibility* in 1999. In 1995, he coauthored *Exploring America Through Its Culture*, a report for the White House Conference on Travel and Tourism. Additional publications include: *Setting the Stage: A Guide to Building Arts and Tourism Partnerships in the Californias* and *Beyond the Bake Sale: A Fund Raising Handbook for Public Agencies*.

Mr. Moskin has served as the President of the California Confederation of the Arts, the President of the San Francisco Bay Area Dance Coalition, and the 1st Vice President of the National Assembly of Local Arts Agencies.

Bill Moskin has been a Bainbridge Island resident for over twenty years. He has served as a board member of the Bainbridge Island Arts and Humanities Council, as a member of the City of Bainbridge Island's Farmland Taskforce, and as a member of the City's Lodging Tax Advisory Committee.

Mr. Moskin is a Certified Sustainable Building Advisor.