



Jeffrey Mansion & Park Master Plan

March 2008

Jeffrey Mansion & Park Master Plan

Jeffrey Mansion Commission

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Jeffrey Mansion & Park Master Plan

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Jeffrey Mansion & Park Master Plan

Executive Summary

The Jeffrey Mansion Commission of the City Of Bexley set out to “develop a plan for the restoration and possible expansion of the Jeffrey Mansion as a multi-purpose community center.” This report to City Council is the product of these efforts

Programs

The programs envisioned for the Jeffrey facility embrace programs of the Bexley Parks and Recreation Department while also providing opportunity for a broader range of activities, which would attract a more diversified group of people. Art exhibits, concerts, lectures and business conferences will fit comfortably along side the existing recreation programs, civic events and celebrations. Many of these expanded uses will create opportunities to charge fees that will help defray the costs of maintaining the mansion, provided that the supporting infrastructure is developed, such as a catering kitchen, bathrooms on each floor, elevator access and convenient and accessible parking.

Physical Plan

The physical changes to the property will make this expanded program possible and, most importantly, bring the mansion to code to ensure the City’s ability to continue to utilize this historic treasure for the foreseeable future. At the present, only 43% of the mansion is being used and only 25% of it is handicapped accessible.

The plan proposes an enhanced entry drive and surrounding landscaping that is more consistent with the original design, while providing for multiple entrances into the mansion itself. An expanded parking area to the north is proposed and a concept for improved circulation and more parking to the south along the west edge of the front lawn was proposed. The south parking was not well received by the public and several commission members. The southern scheme could certainly be put aside for future consideration should the need for the circulation and/or the parking arise from experience.

Management

In light of the expanded and dynamic program envisioned in this report, the Commission has determined that an independent body should bear the responsibility for the management of the facility, freeing the Parks and Recreation Department to concentrate on their program. Proposed is the creation of a new board or commission, appointed by the City and representing the major stakeholder groups in the Jeffrey Mansion and Park. Most of the 13 members would serve by virtue of their affiliation with these stake-holding groups, including the to-be-created community foundation, which will play an important role in the financial well- being of the property. This board/commission would hire the staff needed to manage the facility.

Jeffrey Mansion & Park Master Plan

Executive Summary-Continued

Finances

The financing of the proposed plan falls into two areas: capital and operating expenses. In the business plan, public financing of capital improvements is indicated. When the plan is implemented any number of scenarios combining public and private financing could be used for the capital expenditures. These range from bonding to grants to conventional financing or a combination of all of these. The entire plan as presented has an estimated cost of approximately \$10,000,000. A certain amount of phasing can be used in the actual implementation. The included example shows those improvements necessary to rehabilitate the mansion and expand it to a sustainable operation.

The included income and expense statement indicates an operation that can pay interest on the debt as well as operate the mansion making it the vibrant, accessible and self-sustaining cultural and recreational centerpiece" anticipated in the Commission's vision. This will only be possible with the significant on-going support of the community foundation that is in its formative stages. The success of this foundation is linked directly to the success of the Jeffrey Plan.

Next Steps

It is the recommendation of the Jeffrey Mansion Commission that City Council take the following steps to take maximum advantage of the imminent formation of a community foundation and the momentum gathered by the Commission. In order to move this project to the next step, the following steps are proposed:

1. The proposed master plan should be adopted by the City Council.
2. An ad hoc commission or board should be created, based on the guidelines proposed in the organizational plan, to carry out the following steps. The group would move to permanent status should the plan move forward.
3. Seed money (\$110,000) should be provided from public and private sources for the Commission to consider :

- Engaging one temporary staff person to manage the affairs of the commission/board (\$40,000)
- Engaging a research firm to do a feasibility study on the proposed program for the Mansion and Park (\$15,000)
- Engaging a forester to do an inventory of the Park areas most effected by the proposed changes (\$15,000)
- Obtaining the necessary commitments from the new foundation as to its capacity to support the implementation of the plan.
- Engaging an architect to do additional design of the Mansion in order to more accurately project costs. (\$30,000)
- Engaging legal counsel to draft the legislation needed for a proposed commission/board to operate the facility in conjunction with the City of Bexley and the Parks and Recreation Department. (\$10,000).

Finally, legislation would be prepared to establish a permanent commission and a management agreement with the City. Reliable financials will result from more extensive research, private financing commitments, and costs based on a higher level of design

Jeffrey Mansion & Park Master Plan

Background

In 1941, the Jeffrey Mansion and Park on North Parkview Ave was gifted to the City of Bexley for use as a public park for recreational, instructional and educational purposes. Since that time it has served as the primary park for the City and in recent years as the home of the Parks and Recreation Department of the City. The Park and Mansion have been the location of the majority of programs conducted by the Parks and Recreation Department as well a gathering place for Bexley residents and organizations. It is viewed as one of Bexley's premier assets.

By late in 2006 the century old house had a considerable amount of deferred maintenance. Representatives of a local private foundation, The Bexley Heritage Fund, and City Council joined forces to plan for the long term future of the property by forming the Jeffrey Mansion Commission to develop a plan for the renovation of the mansion that would ensure its survival and sustainability for generations to come. The plan was to include a financing plan for renovations as well as a business plan that would position the property in a more self-sustaining mode. In recent years, the City of Bexley has been spending over \$200,000 per year to keep the building functioning while only utilizing 43% of its space. Subsequent to the formation of the commission, City Council approved a \$1.3 million package to secure the exterior of the building and that work began in the fall of 2007.

The Commission, over the past year, has worked to develop a plan that will more fully utilize the mansion, improve access and flexibility in and out of the mansion, serve a broader range of community residents and generate income to help the City to maintain the property into the future.

The Commission divided into three sub-committees to: 1). Study and define the program, 2). Propose an organization and financial plan for the future and, 3) propose a physical plan to meet the needs of the program and support the financial plan. Each sub-committee also took advantage of experts from the community as well as consultants in development, historic rehabilitation and landscape planning to develop the plan put forward in this document. Two public meetings have been held to get input and comments on the plan as it evolved.



Jeffrey Mansion & Park Master Plan

Background

Commission Vision Statement

The Jeffrey Mansion Commission's vision is to preserve the Jeffrey Mansion and its grounds as a vibrant, accessible and self sustaining cultural and recreational centerpiece with multiple uses appealing to the diverse population of the Bexley Community.

Commission Mission Statement

The Jeffrey Mansion Commission will develop a plan for the restoration and possible expansion of the Jeffrey Mansion as a multi-purpose community center. Utilizing professional consultants and public input, the commission will develop a plan which will include:

- Proposed uses for the Jeffrey property
- Physical changes needed for the plan
- Estimated cost and funding alternatives to complete the plan
- Proposed organizational structure to:
 - Proceed with the planned project
 - Operate and manage the finished 'center' as a sustainable cultural and recreational asset for the community



Jeffrey Mansion & Park Master Plan

Organization & Management

Management Strategy

The Organization/Finance Sub-committee of the Commission determined through, visiting with and benchmarking against similar facilities owned by municipalities that entities independent of the political process have been the most successful in earning income while serving the public. It is proposed that a separate Jeffrey Mansion Board be created whose sole purpose is to manage the Jeffrey property in a manner consistent with the vision set forth by the existing Jeffrey Mansion Commission and in collaboration with the Bexley Parks and Recreation Department. The aforementioned board would manage the facility through an agreement with the City of Bexley as owner of the facility.

The board would consist of 13 members appointed from the following constituencies:

- City Council – 1
- Parks and Recreation Board – 2
- Bexley Board of Education – 1
- Bexley Historical Society – 1
- Bexley Chamber of Commerce – 1
- A Bexley community foundation to be formed – 5
- At-Large members – 2

The actual process of appointment can be decided during the creation of the Commission suggests the majority of the Board should be residents of the City of Bexley

The role of the Board will be to hire the staff needed to operate the property in collaboration with the Parks and Recreation Department consistent with the program outlined in this report. The board will set financial goals and operating standards for the staff and review them on a regular basis. The Board staff will not be responsible for the City recreation programs which will remain the purview of the Parks and Recreation staff of the City. The full report of Organization and Finance committee is included in the Appendix of this report.



Jeffrey Mansion & Park Master Plan

Programs

Programs for the Jeffrey Mansion and Park

The charge to the Program sub-committee was that the program developed should:

- Create a more self-sustaining property
- Make the property the cultural and recreational centerpiece of the community
- Have multiple uses appealing to Bexley's diverse population

The proposed program included:

- The entire existing Bexley Parks and Recreation program
- Expanded civic events such as July Fourth and the Mayor's BBQ
- Expanded cultural programs such as art exhibits and concerts
- Increased revenue generating activities such as catered events and fund raisers

With the expanded use of the facilities it became evident that in order to generate more income producing events, there would be a demand for alcohol service and expanded parking. Alcohol may be permitted in a strictly regulated manner in order to protect others using the facility. The responsibility of drafting and enforcing those regulations will fall on the managing entity of the property. Any caterer may serve alcohol and it is anticipated that neither the City nor the managing organization will hold a liquor license. Liability will rest with the host of the event.

The location and layout of parking is addressed in the site plans. The full report of Program Committee is included in the Appendix of this report.



Jeffrey Mansion & Park Master Plan

Financial Structure & Business Plan

Financial Strategy

The financing of the rehabilitation of the Jeffrey Property and the suggested operating statement are based on the adoption of the organizational recommendation of this plan. Certain assumptions have been made in order to implement this plan. They are as follows:

- The City of Bexley may use its bonding capacity to finance, at the most desirable terms, the proposed changes to the mansion and park.
- A community foundation is created whose highest priority is the funding of the rehabilitation of the mansion and park as well as its continued operation as the primary cultural and recreational facility in the City.
- The Bexley Parks and Recreation Board and staff continue operating their programs at the Jeffrey property including full responsibility for the municipal pool facility.
- The program changes at the facility as described in this report are adopted.
- Physical changes to the facility are consistent with the program put forth in that a policy regarding the use of alcohol at the mansion is adopted and parking is improved to the point of making the facility attractive in the marketplace.
- The following financial picture is just one scenario as to how the Jeffrey Property might operate in the future to the benefit of the entire community.



Jeffrey Mansion & Park Master Plan

Conceptual Sources & Uses of Funds

Sources of Funds

Bonds and/or Private Financing *\$7,300,000

Use of Funds

Mansion Rehabilitation \$4,750,000

Front Entry & Drop-Off \$920,000

Mansion Landscape Restoration \$473,000

North Woods Parking \$975,500

Repayment of Seed Monies \$110,000

Total Use of Funds **\$7,228,500**

** Potential Sources to Reduce the Need for Financing*

Grants- Historic Credits & Other *\$5,000-\$1,200,000*

Naming Opportunities

Courtyard Function Room *\$600,000*

Mansion Gardens *\$400,000*

Furnishings *\$210,000*

NOTE: The usage of funds in this scenario is based on the minimal improvements needed to expand the use of the Mansion in order to earn significantly more income and reduce costs to the City.

Jeffrey Mansion & Park Master Plan | *Conceptual Income*

	Occupancy Range	Usage	Revenue
Ground Floor			
Program Space	30-50	classroom	\$0
Special Events Space	120-150	20@\$3,000	\$60,000
First Floor			
Garden Room	50-80	20@\$1,000	\$20,000
Dining Room	13-30	30@\$100	\$3,000
Library	5-8	-	\$0
Total First Floor	75-130	10@\$3,500	\$35,000
Tent	250	5@3500	\$17,500
Total First Floor & Tent	250	5@\$5,000	\$25,000
Second Floor			
Small Conference Room (2)	8-12 each	50@\$25	\$1,250
Large Conference Room (1)	10-20	45@\$40	\$1,800
Public Conference Room	8-12	-	\$0
Offices (2) / Classrooms (2)	-	-	\$0
First and Second Floors (Conferences)	30-120	6@\$2,000	\$12,000
Third Floor-Parks & Rec Offices			
Offices (8) / Conference Room	-	-	\$0
Other Jeffrey Mansion Income			
City of Bexley Budget (2008)	-	-	\$263,000
Jeffrey Park			
City of Bexley Budget (2008)	-	-	\$150,000
Sponsorships	-	20@\$5,000	\$100,000
Community Foundation Contribution	-	-	\$100,000
Total Yearly Income			\$788,550

Jeffrey Mansion & Park Master Plan

Conceptual Expense

	Full Time Employees	Expense
Mansion		
Personnel	3	\$181,550
Marketing	-	\$45,000
Utilities	-	\$65,000
Mansion Maintenance	2	\$80,000
Park		
Personnel	1	\$70,000
Landscape Maintenance	-	\$55,000
Total Operating Expense		\$480,000
Interest on Debit		\$292,000 <i>(4% on \$7.3 million)</i>
Total Yearly Expenses		\$788,550

Jeffrey Mansion & Park Master Plan

Mansion Master Plan Concepts

Responsible Dreaming

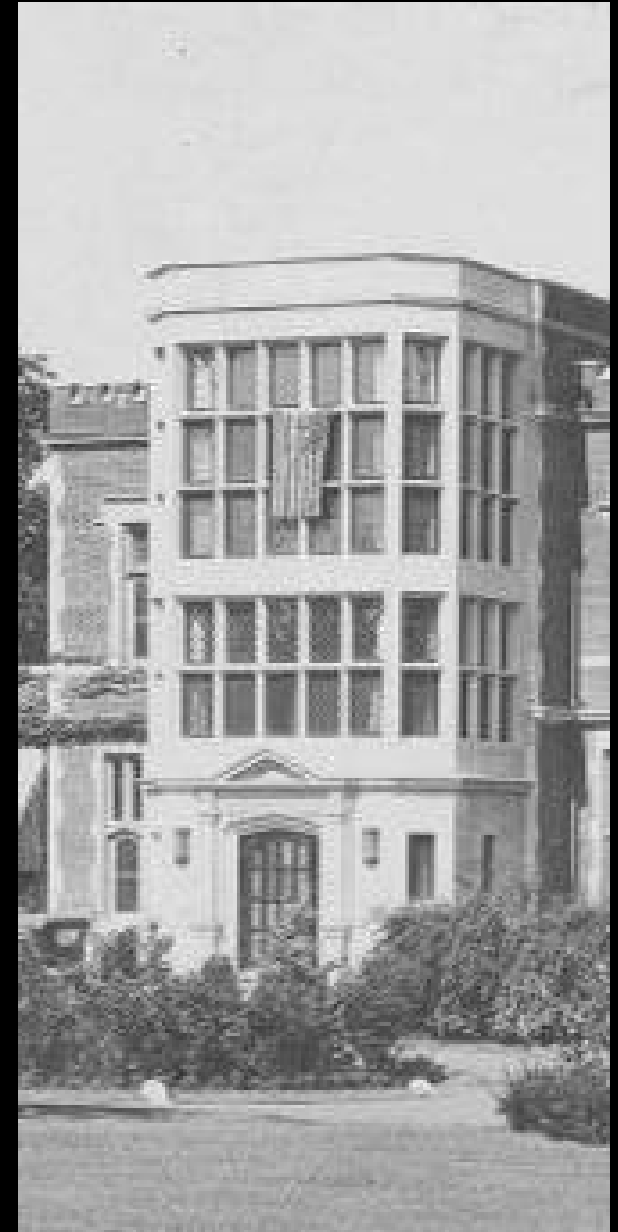
Some issues to consider regarding renovation of Jeffrey Mansion

Historic Preservation

Jeffrey Mansion is eligible to be listed in the National Register of Historic Places. Pre-dating most of the houses in Bexley, it is the architectural cornerstone of one of the City's – and the Region's – most important neighborhoods. The building is significant because of its association with the Jeffrey family, for its architecture, designed by prominent Columbus architect, Frank Packard, and for its importance to the Bexley community. While the Mansion has been altered some over the years, much of the exterior and interior is intact. It is important that any future renovation project respect and enhance the historic, character-defining elements of the building. Renovation of Jeffrey Mansion should conform to the Secretary of the Interior's *Standards for Historic Preservation* – a national design standard for historic buildings.

Life Safety & Codes

Jeffrey Mansion was designed as a single-family house (albeit a large one), not as a public building. The City has made some improvements in the area of egress (exiting requirements) and accessibility (first floor only) that make the building acceptable for limited public use and for limited office space. If the Mansion is to be more completely used, additional life safety and code compliance work will be necessary. For example, an elevator is needed to provide accessibility to the upper and lower floors. In all likelihood, a sprinkler system should be installed, especially if all floors are to be utilized. Other code "upgrades" will involve mechanical and electrical systems.



Jeffrey Mansion & Park Master Plan

Mansion Master Plan Concepts

Responsible Dreaming - Continued

Some issues to consider regarding renovation of Jeffrey Mansion

Flexibility

One issue confronting increased use of the Mansion is that it has – for all practical purposes – only one entrance, the front door. If an event is scheduled for the Living Room or even the Garden Room, people entering for other functions have to traipse through the event already in progress, creating an awkward situation at best. Especially if private parties involving alcohol are being considered, it would be a good idea to see how the building might accommodate better separation of activities, to better support concurrent, multiple uses.

Opportunities for Expansion

Currently less than half of the existing building is being utilized (unless loosely organized storage is considered). At the same time, some of the things the Program Committee would like to do at the Mansion are stymied by lack of space. Consistent with the historic preservation goals outlined above, appropriate opportunities for expansion of usable space at the Mansion should be carefully considered.



Jeffrey Mansion & Park Master Plan

Mansion Master Plan Concepts

4 Ways to Expand the Mansion

“Found Space”

The concept of found space is simply to identify existing building areas that are not being used – or which are underutilized – and renovate them for appropriate new, expanded uses. For Jeffrey Mansion, this primarily means the third floor and the ground (basement) floors. These areas are used for storage now and both areas show great potential for use.

Traditional Additions

The Garden Room is an example of a “traditional” addition. Design of additions to important buildings is a tricky business, but it certainly can be done. A traditional addition has not surfaced as a desirable solution at the Jeffrey Mansion.



Jeffrey Mansion & Park Master Plan

Mansion Master Plan Concepts

4 Ways to Expand the Mansion

Underground Additions

Underground additions can be used when the original architecture of the building is so important that a visible, traditional addition is not desired. These are very costly and not a good solution for Jeffrey Mansion.



Temporary Additions

Sometimes larger spaces are needed, but only for short durations. In this case a large tent might be considered. Issues such as power, lighting, heat and restrooms must be considered. This approach might be a way to “test” the desirability of adding large assembly spaces to the Mansion, or simply be a way of adding flexibility to the useable space of the building.



Jeffrey Mansion & Park Master Plan

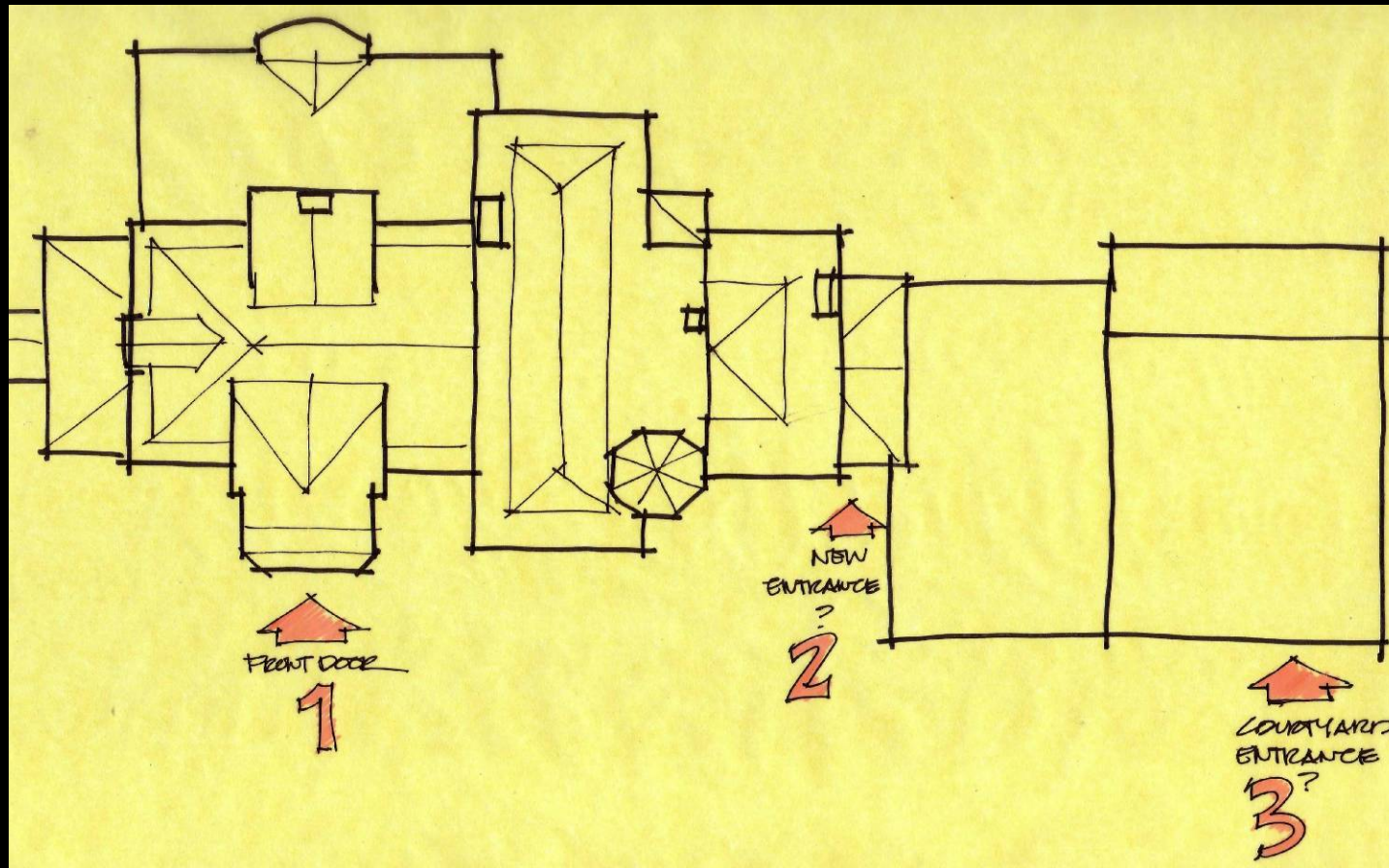
Mansion Master Plan Concepts



Jeffrey Mansion & Park Master Plan The following pages illustrate design concepts that are intended to reflect the potential of the Jeffrey Mansion and Park to meet the goals of the Program Committee of the Jeffrey Mansion Commission. The ideas shown were developed by the consultants with extensive input from the existing users, from the Commission members, and the general public. The designs shown are by no means the only or the final designs, but rather they are intended to facilitate discussion and comment. As the project evolves, more information will be collected, influencing the final design. Feasibility will be measured and the designs will be adjusted to meet financial realities, as appropriate. Some phasing of the improvements may need to be incorporated to accommodate either funding availability or operational considerations. Implementation of all elements of the design as shown here are not necessary to the total success of the endeavor.

Jeffrey Mansion & Park Master Plan

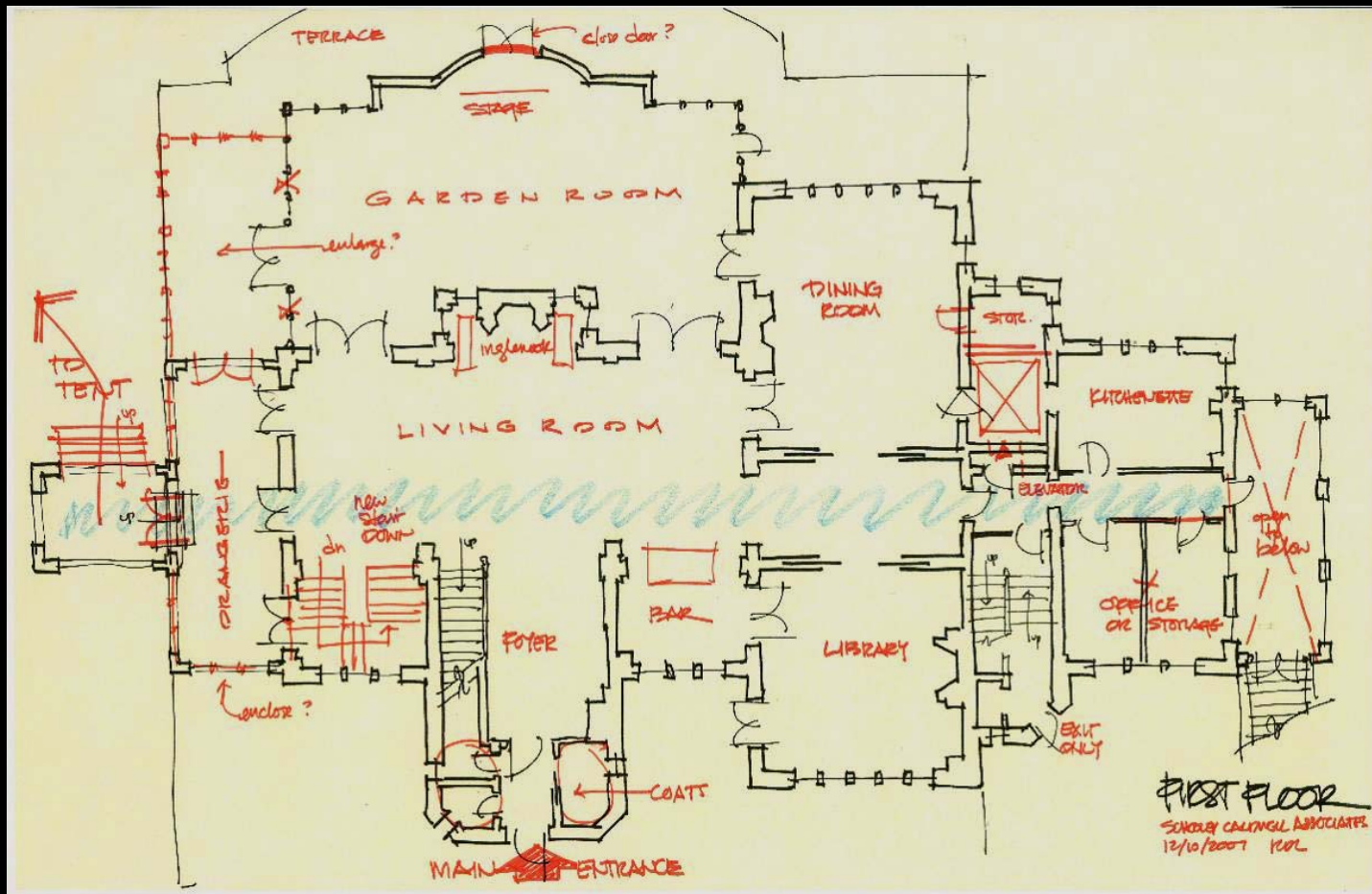
Mansion Master Plan Concepts



Multiple Entrances: The concept for the Mansion is to create three, distinct entrances along the east side. The front door, grants access to all of the active areas on the traditional first floor, along with access to the Grand Stair. An 'at grade' entrance (basement level) could be created at the former 'north porch' location. A new lobby in this location could accessibly connect the parking lot to the activity areas on the second and third floors. This access point could be independent of activities taking place on the first floor. Finally, if the parking court to the north were to be developed into a large special events space, it could have its own exterior entrance and drop-off from the proposed parking area. This area could also function independently ultimately allowing multiple events to take place in the Mansion simultaneously. All new entrances to the Mansion shall be accessible.

Jeffrey Mansion & Park Master Plan

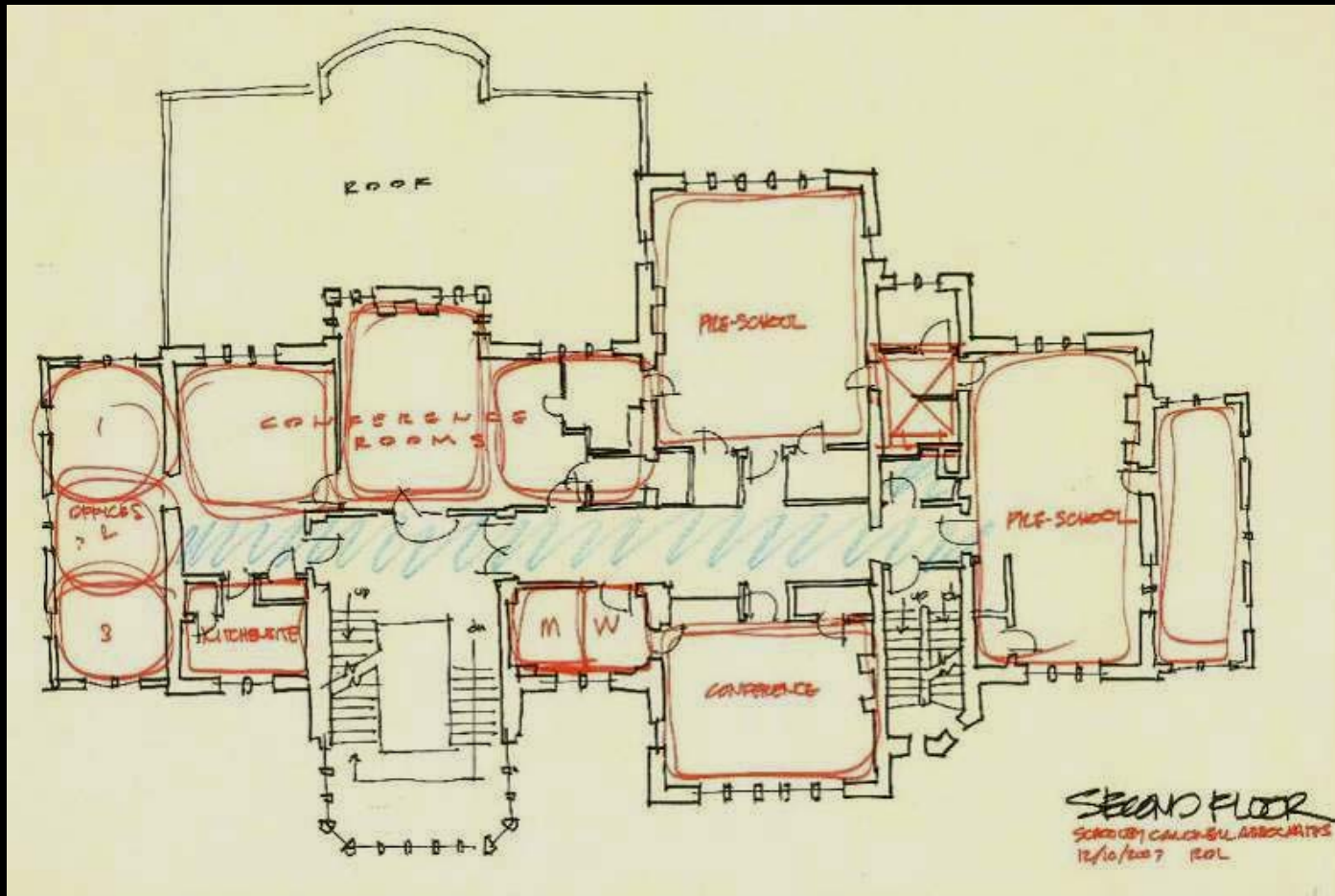
Mansion Master Plan Concepts



First Floor – The main “living” space of the Mansion should be restored to elegant spaces. The Garden Room is an asset – perhaps the south porch and adjacent areas could be enclosed to give more space and flexibility to access this area. The south east parlor area might be a location for a new, open stair to the lower level, increasing access to this part of the house. The Butler’s Pantry is a perfect location for an elevator to provide accessibility to all levels of the house. The elevator should be sized to facilitate moving tables, chairs and catering carts through the house.

Jeffrey Mansion & Park Master Plan

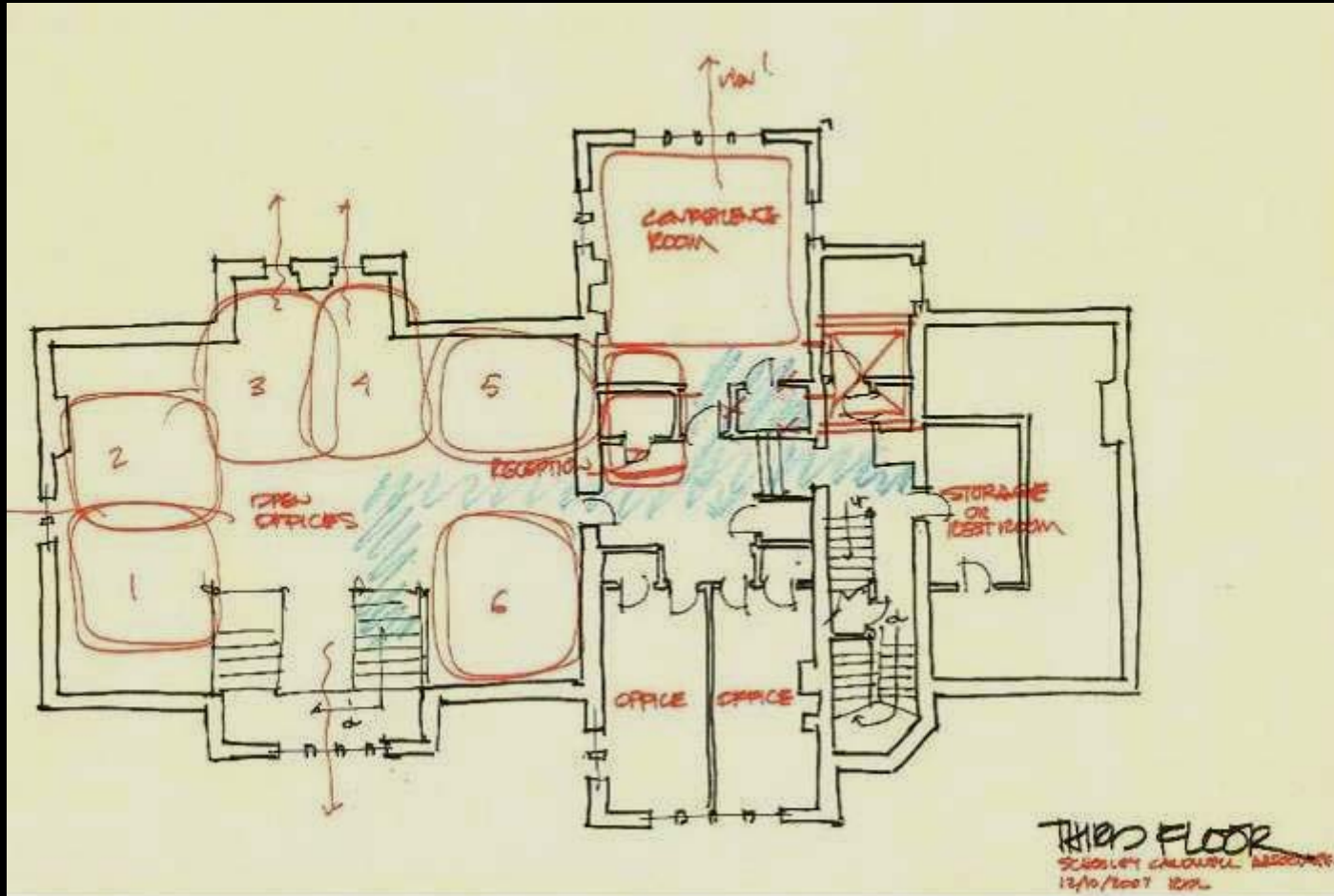
Mansion Master Plan Concepts



Second Floor – The second floor could be developed in to a conference center facility, with a number of elegant conference or meeting rooms that could double as program space for recreation programs. It is assumed that the existing pre-school would remain (with some modifications to accommodate the elevator). There is room for a few staff offices, a kitchenette and restrooms on this floor.

Jeffrey Mansion & Park Master Plan

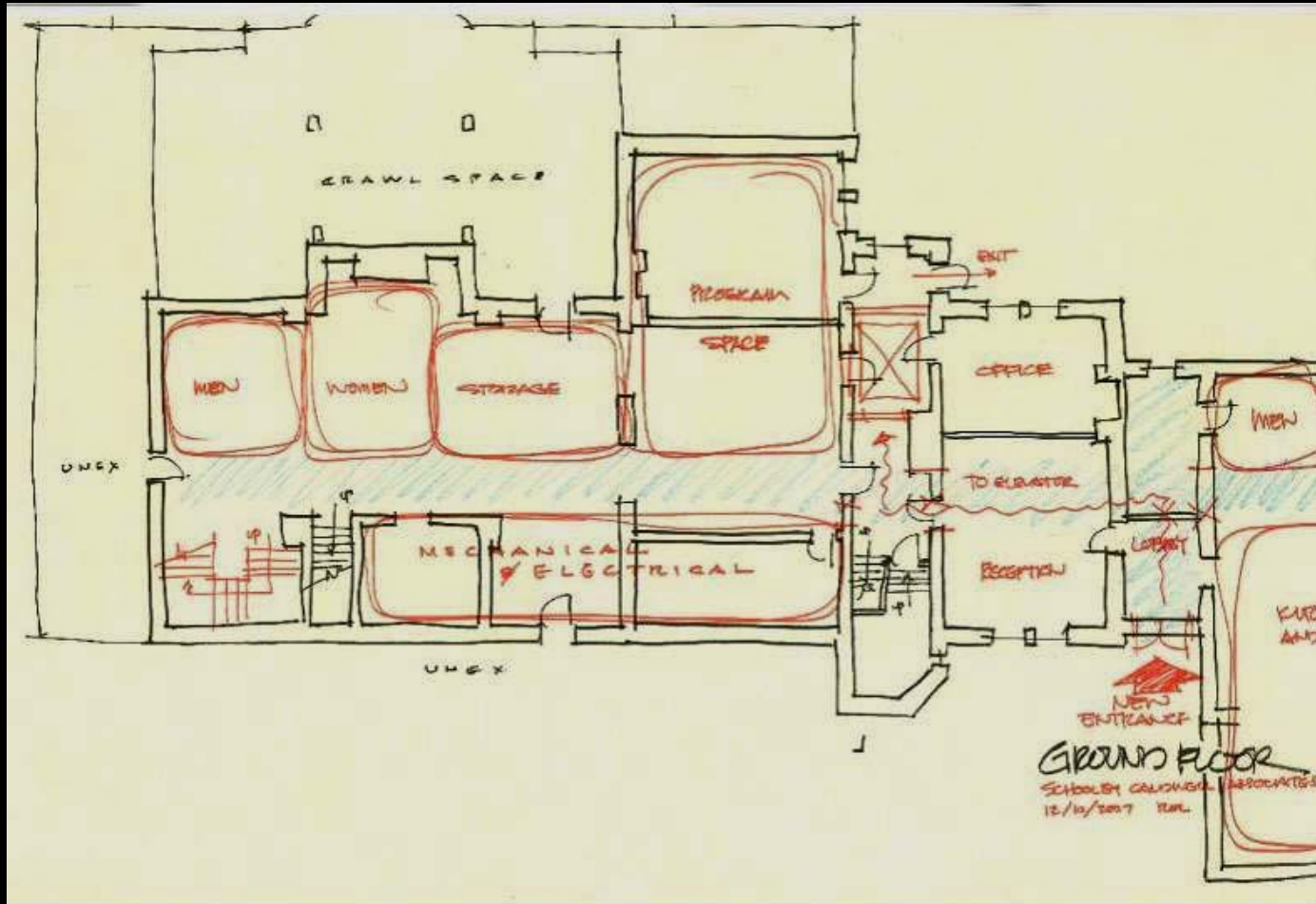
Mansion Master Plan Concepts



Third Floor – In this scheme, it is envisioned that the Parks and Recreation Department would be relocated to the third floor. The available space is considerably larger than what they now occupy, and views of the park are magnificent. With access via the grand stairway and the new elevator, the offices will be convenient for all to use. The daily presence of the recreation offices will be a big boost to the viability of the Mansion.

Jeffrey Mansion & Park Master Plan

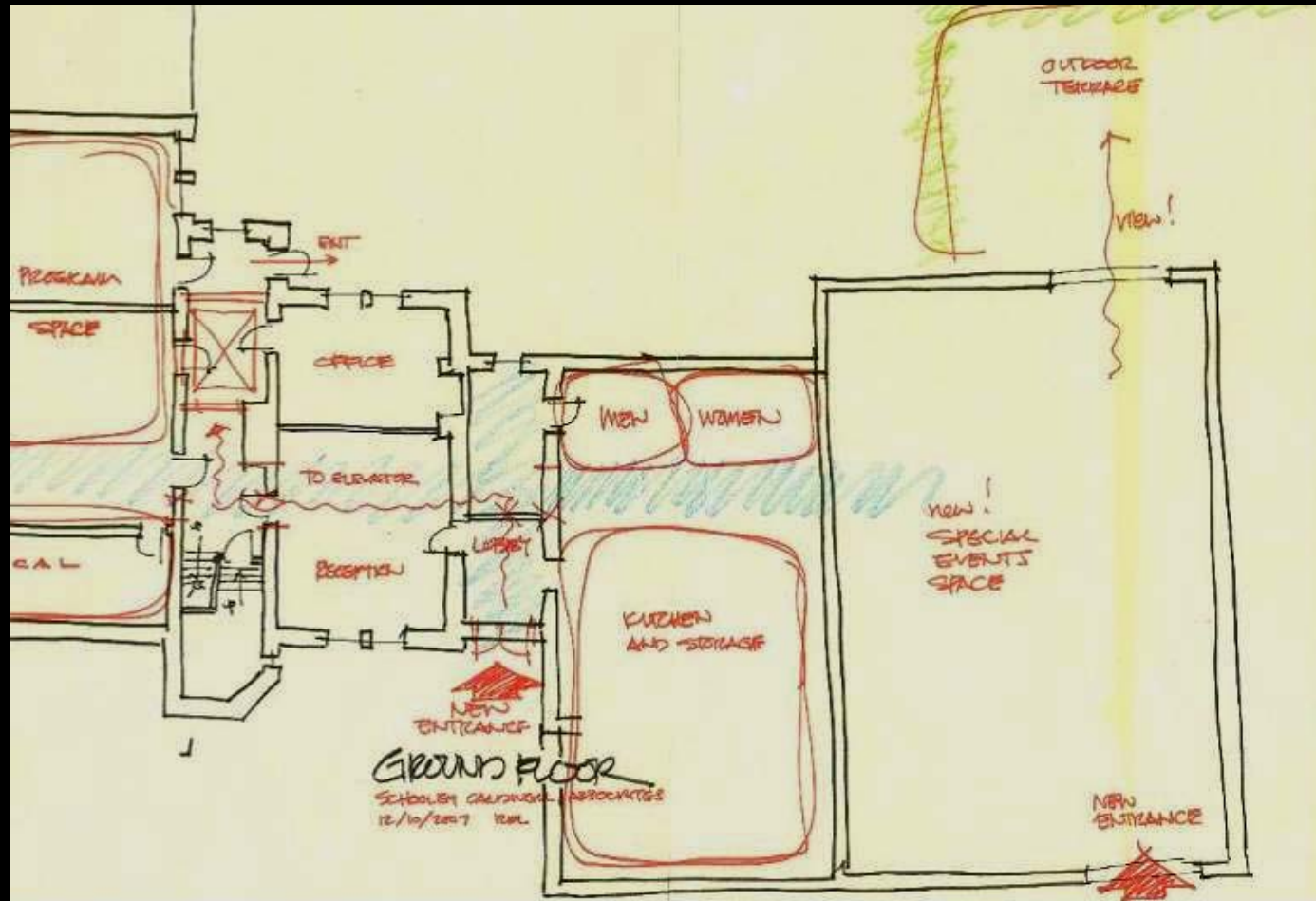
Mansion Master Plan Concepts



Ground Floor (south) – The Ground Floor (basement) is the same area as that of the original house (See the First Floor). Relocating the ductwork and possibly lowering the floor will create very usable space. Suggested uses include major restrooms for special events, storage, and mechanical/electrical equipment spaces. In addition, some of the rooms on the west side are at grade and have nice windows – this area can be utilized as program or office space as required. In addition, the north porch stair (from grade up to the first floor) could be removed and a new, grade level entry created. The new elevator and the rest of the Mansion could be accessed via this new door – part of the multiple entrance concept illustrated earlier.

Jeffrey Mansion & Park Master Plan

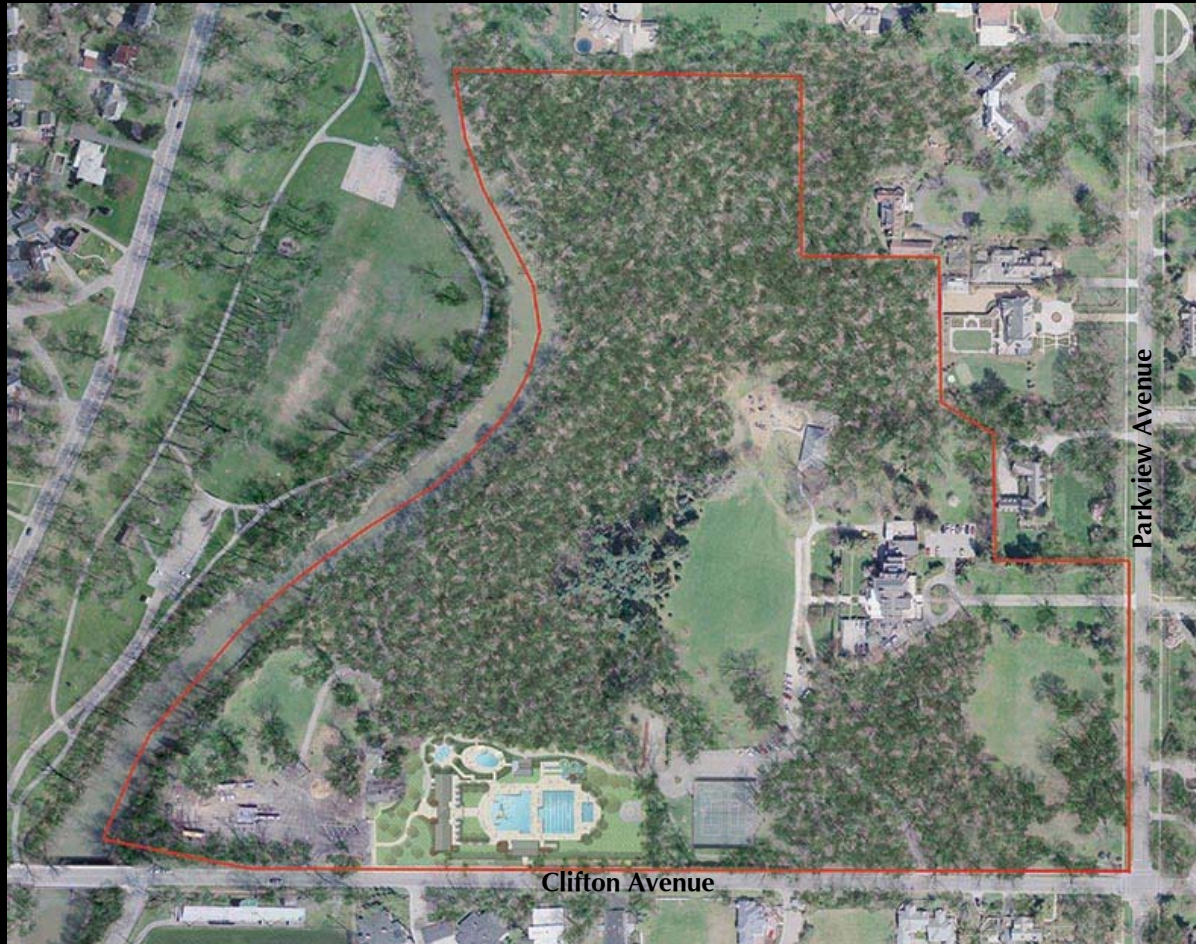
Mansion Master Plan Concepts



Ground Floor (north) – One of the program issues discussed by the commission is that the size of special events is limited by the size of the Living room and Garden Rooms on the first floor. One possible solution would involve enclosing the walled auto court and garage area at the north end of the Mansion. It could be enclosed – maybe with a glass roof – and it could have its own entrance from drop-off and parking areas. A terrace with fabulous views of the park to the west could be incorporated. This multi-purpose area, complete with a catering kitchen and restrooms could be operated independently when the Mansion is otherwise closed. This area might be designed to seat 150 – 200 guests.

Jeffrey Mansion & Park Master Plan

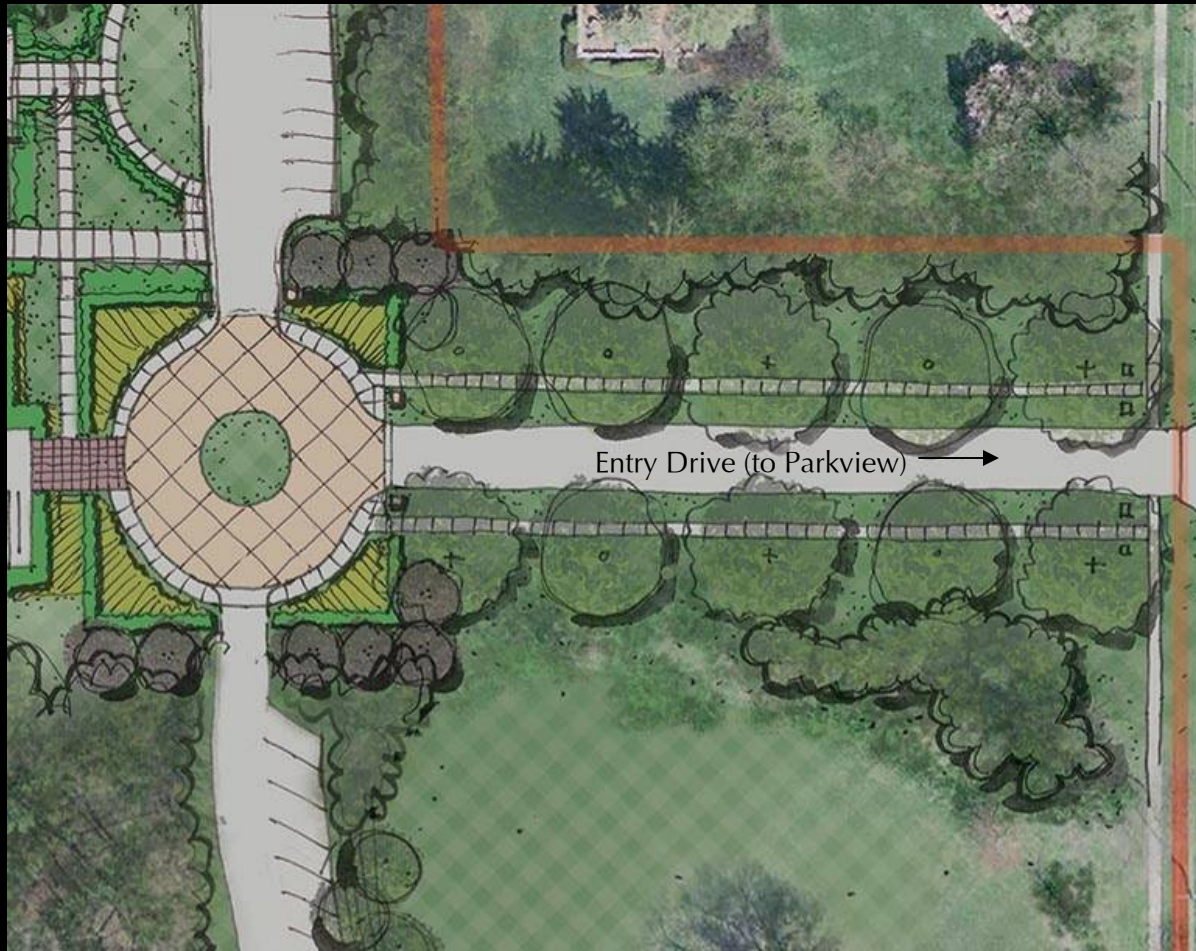
Park Master Plan Concepts



Jeffrey Mansion and Park – The Jeffrey Mansion and Park site is 32 +/- acres of predominantly wooded land on the east side of Alum Creek. A stately Jacobethan Revival style mansion is sited on the high ground overlooking a +/-1.75 acre meadow. Several activity areas are found along the south edge at Clifton Avenue: the Bexley Pool, tennis courts, and a large parking lot. The former caretakers house in this area is the home of the Bexley Historical Society. A shelter house and tot lot are in the interior to the northwest of the Mansion. The +/- 18.5 acre woods are home to a myriad of wildlife and are laced with walking paths of natural materials.

Jeffrey Mansion & Park Master Plan

Park Master Plan Concepts



Entry Drive & Drop-Off – A new front entry and drop-off, taking it's cue from the original plans, strengthens the pedestrian connection to Parkview Avenue. A larger drop-off enhances the functionality of the rehabilitated Mansion, while the overall landscape character speaks to the quality and craftsmanship found within.

Jeffrey Mansion & Park Master Plan

Park Master Plan Concepts



Mansion Landscape – The Mansion landscape extends the interior space into the garden and replaces materials well past their prime. The overall garden is enlarged by removing the small parking area to the south. The additional space unifies the original garden and creates an opportunity for a temporary event venue such as a tent or stage.

Jeffrey Mansion & Park Master Plan

Park Master Plan Concepts



North Woods Parking – An expanded parking area stretches to the North through a lesser used, sloped, portion of the park. Buffers of 30-40 feet enhanced with understory planting are retained to screen the parking and respect the houses backing on the woods. Approximately 85 spaces would be created to support events and activities in the Mansion and create a drop-off for the existing shelter house. Though a large number of trees would be removed in this area, appropriate reforestation guidelines (i.e.: equal caliper replacement for desirable trees removed) should be adopted and implemented throughout the woods with the guidance of a certified arborist.

Jeffrey Mansion & Park Master Plan

Park Master Plan Concepts



South Woods Parking – The South Woods parking scheme removes the existing roadway (dashed red line) from Clifton Avenue to the existing tennis courts, and replaces it with a drive from the Mansion drop-off to Clifton Avenue. The single lane drive can be enhanced to include roughly forty angled parking spaces. Skirting the woods at the rear of the front lawn, the drive would be partially depressed and buffered with understory plantings to hide it from Parkview Avenue. Benefits include improved vehicular circulation and increased parking near the mansion and front meadow. Sensitive design will be critical to protect several specimen oak trees. The area of the abandoned road would be reforested to unify two smaller sections of woods. The Commission generally views this scheme as a future option based on the success and demand of increased program throughout the Mansion and Park.

Jeffrey Mansion & Park Master Plan | Parking Comparison

Existing Parking *67 space / Acre*

	Area	Spaces
• Mansion Guest Parking	5300 sf	16 (0 ADA)
• Mansion Staff Parking	7050 sf	13 (1 ADA)
• Tennis Court Parking	25,510 sf	31 (2 ADA)
• Pool Parking	43,050 sf	72 (4 ADA)
<hr/>		
<i>Totals</i>	85,600sf (1.97 Acres)	132 (7 ADA) spaces

Proposed Parking *100 spaces / Acre !!!!!!!*

	Area	Spaces
• North Woods Parking	29,920 sf	+/- 85 (4 ADA)
• South Woods Parking	13,365 sf	+/- 40 (2 ADA)
• Great Meadow / Picnic Grove Parking	11,250 sf	+/-28 (2 ADA)
• Pool Parking	43,050 sf	72 (4 ADA)
<hr/>		
<i>Totals</i>	97,200 sf (2.24 Acres)	225 (12 ADA) spaces

Net Gain in Proposed Concept +11,600 sf (.3 Acres) +93 (5 ADA) spaces

In the Park Master Plan Concept, proposed parking has increased 60% over the existing while the total paved square footage has only increased 1.6%. If the South Woods Parking is excluded from the concept the total paved area decreases +/-2000 square feet from the existing and the total available parking still increases by 40%.

Jeffrey Mansion & Park Master Plan

Park Master Plan Concepts



Great Meadow & Picnic Grove- This large area reaching north and south immediately behind the Mansion is a critical part of the overall Mansion garden and a significant transition zone in terms of the passive nature of the Great Meadow and the intensely active nature of the pool complex. It provides an ideal location for 'Day Care Central', picnicking and other community events. A reconfigured parking and drop-off area provides safety and functionality to all of these activities while actually adding +/- one acre of green space to the Great Meadow.

Jeffrey Mansion & Park Master Plan

Park Master Plan Concepts



Active Area- The Bexley Pool facility and ancillary parking is already a very active area of the park. Relocating the tennis courts to this area allows for shared parking and a concentration of noise, lights and traffic further from the Mansion, the Great Meadow and the adjacent residential neighborhood. Some space would still remain to allow for flexibility in active programs in the future.

Jeffrey Mansion & Park Master Plan

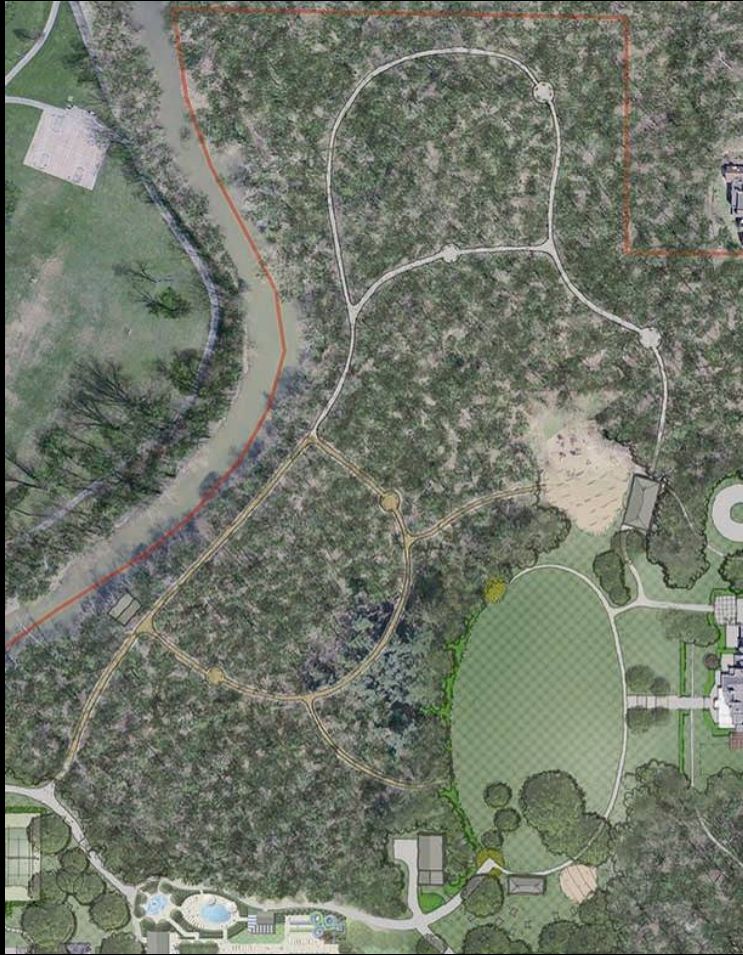
Park Master Plan Concepts



Creek Access- The Alum Creek has always been a great asset to this park and is key in supporting the wildlife on the property. With efforts in the community to clean and maintain it, it seems appropriate for the Jeffrey Park to access the water's edge more directly. The best location for that is immediately west of the pool parking where the grade meets the water. Opportunities abound for boating, fishing and environmental education. Suggestions from the Friends of Alum Creek, such as generous setbacks from the creek, permeable paving and other sustainable design elements should be incorporated into the final design of the park.

Jeffrey Mansion & Park Master Plan

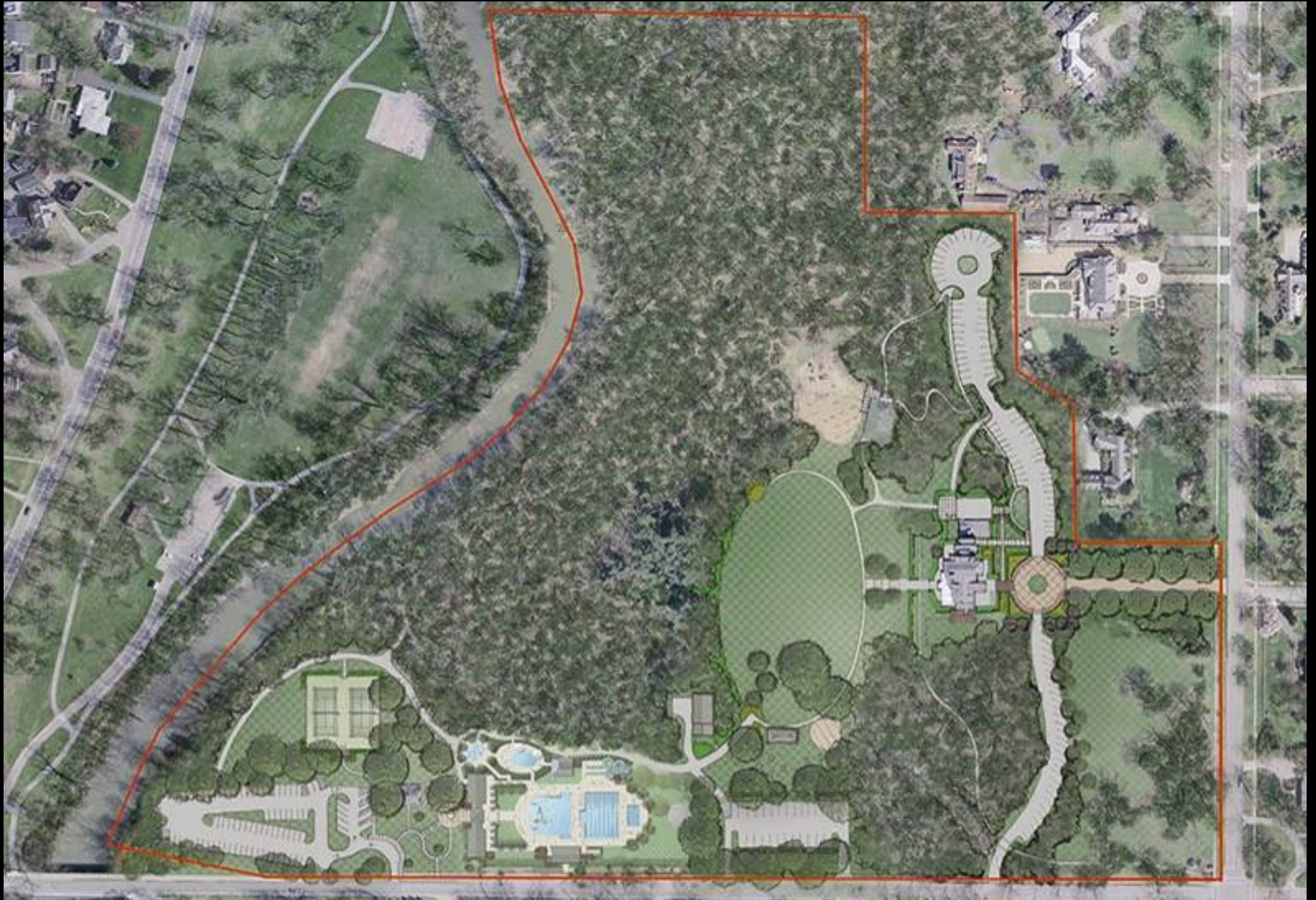
Park Master Plan Concepts



Woodland Improvements-The Jeffrey Park Woods, one of the most unusual and equally as valuable assets for a city the size of Bexley, could be enhanced with accessible paths in some areas to allow a broader range of citizens to enjoy its beauty. Natural benches, small gathering areas, environmental and wildlife signage and an accessible creek overlook shelter would create minimal disturbance. A woodland management program should be established to keep the woods safe for users and sustain a healthy woodland for generations to come.

Jeffrey Mansion & Park Master Plan

Park Master Plan Concept - Full View



Jeffrey Mansion & Park Master Plan

Conceptual Opinion of Cost

Mansion Concept Cost Summary

1.	1 st Floor	6,141 sf	\$179 / sf	\$1,100,000
2.	2 nd Floor	4922 sf	\$160 / sf	\$788,000
3.	3 rd Floor	3918 sf	\$125 / sf	\$490,000
4.	Ground Floor - (Ex)	4,377 sf	\$209 / sf	\$915,000
5.	Special Events Area	3,422 sf	\$243 / sf	\$833,000
6.	Furnishings		allowance	\$210,000

Total Mansion Cost Range

\$4-\$5 Million

Park Concept Cost Summary

1.	Front Entry Drive & Drop Off	\$920,000
2.	Mansion Landscape Restoration	\$473,000
3.	North Woods Parking	\$975,500
4.	South Woods Parking	\$400,000
5.	Great Meadow Improvements	\$1,350,000
6.	Picnic Grove Parking Lot	\$187,000
7.	Activity Zone Improvements	\$511,000
8.	Waters Edge Access	\$55,000
9.	Woodland Improvements	\$288,500

Total Site Cost Range

\$4.75-\$5.5 Million

Total Project Cost Range \$8.75 – \$10.5 million

**The costs include: design contingency, construction contingency, fees, permits and reimbursable expenses. Costs reflect 2008 dollars, escalation beyond 2008 is not included. Financing, moving, phasing, and operational costs are not included

Jeffrey Mansion & Park Master Plan | *Conclusion*

The plan presented here is the result of numerous hours of meetings and deliberations on the part of a group of ten Bexley citizens with the assistance of consultants in the fields of community development, historic preservation, planning, and architecture. Two community wide meetings were held for broader input. The plan is respectful of the natural and historic nature of the property while increasing capacity, enhancing recreational opportunities and anticipating the future. As previously stated, the designs shown are not a final design but a means of exploring and testing the expansion of programming at the Mansion and Park and a means to assist the City of Bexley in maintaining a valuable asset for generations to come. The proposed plan has the nearly unanimous agreement of the Jeffrey Mansion Commission.

In order to move this plan forward, the Commission recommends that City Council take the following steps to take maximum advantage of the imminent formation of a community foundation and the momentum generated by the process. In order to advance this project to the next level, the Commission proposes the following:

1. Adoption of the proposed master plan by the City Council.
2. Creation of an acting commission or board based on the guidelines proposed in the organizational plan, to carry out the following steps. The acting commission would become the permanent commission should the project go forward. Seed money (\$110,000) should be provided from public and private sources for the suggested purposes of:
 - Engaging one staff person to run the affairs of the commission/board. (\$40,000)
 - Engaging a research firm to do a feasibility study on the proposed program for the Mansion and Park. (\$15,000)
 - Engaging a forester to do an inventory of the Park areas most effected by the proposed changes. (\$15,000)
 - Engaging legal counsel to draft the legislation needed for a proposed commission/board to operate the facility in conjunction with the City of Bexley and the Parks and Recreation Department. (\$10,000)
 - Obtaining the necessary commitments from the new foundation as to its capacity to support the implementation of the plan.
 - Engaging an architect to do further design of the Mansion in order to more accurately project costs (\$30,000).

At this point, legislation would be prepared to establish a permanent commission and the management agreement with the City. Financials will have been tightened, through more extensive research, private financing commitments, and rehabilitation costs based on a higher level of design.

Jeffrey Mansion & Park Master Plan

Dissenting Vote

To: Jeffrey Mansion Commission Members
Bexley City Council
From: Ann Brennan, Commission Member
Subject: Dissenting Vote on the Jeffrey Mansion Commission's Recommendations
Date: March 10, 2008

After many months of thoughtful consideration I must honor my deeply held beliefs and vote against the recommendations that are proposed by the Jeffrey Mansion Commission. Let me clarify that I am in favor of making the necessary improvements to the Mansion so that it can continue to be used for recreational and community purposes. Having grown up in Bexley, I treasure the Mansion and the surrounding park grounds.

It was my hope as the Commission began its work more than 16 months ago that we would seek input from the public on a variety of options for renovating the Mansion. Somewhere along the line this concept was dropped in favor of a master plan, and the plan would also include the surrounding grounds. I have since the first meeting of the Commission expressed serious concerns about including the park grounds under the Commission's charge. I assumed that the Commissioners would give equal priority to preserving the woods as they considered renovating the Mansion. My fear, which has now been realized, was that parts of the park and particularly the natural woods would be sacrificed to allow for an expanded parking lot, literally "paving paradise to put up a parking lot."

I realize that parking solutions need to be explored, however I am strongly opposed to the plan which now calls for destroying a significant part of the woods on the north side of the building to put in a large parking lot of 85 spaces. Additionally the plan also calls for a possible road added to the south side of the Mansion bordering the front lawn and the side woods and extending on to Clifton.

The words "vision" and "change" have been bandied about quite a bit by both members of the commission and the consultant's working for the commission, as if all change is positive. Many on the Commission view this plan as positive change. I do not. Early in the process we were asked by our facilitator to think about what we held sacred when we thought of the Mansion and the park. What came first to my mind were the beautiful natural woods and park, and the meandering trails along the undisturbed creek-bed. True visionary thinking would preserve this precious parcel of land for future generations to enjoy and consider alternatives to this parking lot proposal and master plan.

Although my main objections to the plan relate to parking, I also have other reservations. I remain skeptical about this event center concept and the impact regular weekend and weekly rentals will have on the community. I am not convinced that the increased rentals will enable the Mansion to be self-sustaining. Even if it were, would the increased traffic and related noise be an acceptable trade-off for the park users and the neighboring residents, some who would in the future gaze down upon a very large, lighted parking lot.

Jeffrey Mansion & Park Master Plan

Dissenting Vote

Continued

Fellow commissioners have asked me what would I suggest as an alternative to this master plan. I would have preferred that we had reviewed different options, at different price points, such as considering a more modest and less costly renovation, that would require less parking. I suggested several times that we consider valet and remote parking plans, noting that the pool lot would be available nine months out of the year. No such parking options were presented. Consideration should be given to renovating the space that currently exists, taking into account handicap accessibility and a more modest parking plan, and marketing the renovated space for smaller events. Increases in rental income would still occur, which would reduce the dependence on city funds for future maintenance.

While I appreciate the time and effort commissioners devoted to this endeavor I remain opposed to this master plan. I simply cannot support a plan that destroys a large section of the woods. We live in a small, landlocked community with very little open green space that includes only one natural wooded area, once it is paved the landscape is forever changed, and not for the better.

Jeffrey Mansion & Park Master Plan

Appendix 'A'

Program Committee Report



Jeffrey Mansion & Park Master Plan

Appendix 'A'

Program Committee Report

Summary

Consistent with the vision of the Jeffrey Mansion Commission “to preserve the Jeffrey Mansion and its Grounds as a vibrant, accessible and self-sustaining cultural and recreational centerpiece with multiple uses appealing to the diverse population of the Bexley Community”, the Program Committee has studied the present Parks and Recreation Programs, interviewed Parks and Recreation staff, looked at the programs at comparable facilities in and out of state and formulated the attached outline of an enhanced Program for the Jeffrey Mansion and Park.

In summary, three groupings of activities or programs were developed and proposed to take place inside the Mansion or on the Grounds. They are as follows:

Programs of the Bexley Parks and Recreation Department

- This program is widely accepted and embraced by the community and the Committee deemed it important to continue it as is.

Expanded Public Event Programming

- Along with the traditional events held at Jeffrey Mansion the Committee saw great opportunities for diversification to attract a wider audience from the community. Such events could be concerts or film series in the Mansion or on the grounds. Lectures, art exhibits and a Music Café might also work.

Revenue Generating Activities

- While many of the activities in the above categories generate some revenue, the suggested program is intended to bring increased income to the facility to support a larger, specialized management team and pay for the ongoing maintenance associated with such an extensive historic property.
- Conferences and retreats could be added to the more common family celebrations and fundraisers for various nonprofit organizations.

At the present time, only about 40% of the Mansions viable space is being utilized so it is anticipated much more activity can be absorbed there when restored. Intensifying its use will bring up other considerations such as parking on and off the property, alcohol usage on the property and conflict of uses. We look forward to working with the consultants, the public and the Plan Committee in exploring various concepts that will evolve out of our proposed program.

Jeffrey Mansion & Park Master Plan

Appendix 'A'

Program Committee Report - Continued

The Program Committee submits this proposal to the full Commission for their approval so that the master planning of the facility can move forward. A more in depth description is on the following two pages.

Proposed Recreation Programs for Jeffrey Mansion [i]

Mansion*

Bexley Parks and Recreations programs
[Scheduled classes as established in the Mansion]
Pre-school
Story Time

Grounds

Parks and Rec Day Camp / Sports
Swimming Programs

Proposed Revenue Generating Activities for Jeffrey Mansion [ii]

Mansion*

<i>Celebrations</i>	Fundraisers
<i>Photo shoots</i>	Workshops
<i>Overnights for youth group</i>	Garden Shows / Sales
Concerts	Teas
Conferences	Wine Tastings
Business meetings	Art Openings
Retreats	

Grounds

Weddings
Photo Shoots
Picnics in the Shelter
Concerts
Story Telling

Proposed Public Events for Jeffrey Mansion [iii] [iv]

Mansion*

<i>Christmas Shop Hop</i>	Poetry Readings
<i>Pancake Breakfast</i>	Art Exhibits
<i>Public Meetings</i>	Reading Room
<i>Senior Party</i>	Music Café
Lectures	
Concerts	
Film Series	

Grounds

<i>July 4th Celebration</i>	Concerts
<i>Harvest Festival</i>	Film Series
<i>Labor Day Cookout</i>	Story Telling
<i>Easter Egg Hunt</i>	Community Garden
Children's Garden	Club Headquarters

Presently taking place

Jeffrey Mansion & Park Master Plan

Appendix 'A'

Program Committee Report – Continued

NOTES:

- [i] It is assumed that the existing Parks and Recreation Programming will continue as is, which is to say class offerings may vary and some programs will take place in other venues. 43% of the classes presently take place in the Mansion and 79% of the overall programs take place at Jeffrey Park (including the Mansion). The Program committee realizes that if the use of the Mansion were expanded to include a great deal of the suggested new activities other issues such as parking and additional space will arise.

- [ii] Understanding the interest in making the Mansion self-sustaining in the future, and number of revenue generating ideas have been presented. Some of these already take place but have not reached their potential because of limitations of space and available time slots. Also, there is presently very limited use of alcohol allowed on the property. The committee understands the need to serve alcohol to expand this category of activities, compete in the marketplace and maximize potential revenues but is conflicted because of mixing children in an adult environment. This will be an important topic of conversation as we explore the potential of the site and design a plan to reach our long-term goals.

- [iii] The Jeffrey Park and Mansion make up Bexley's main community gathering space across age and socio-economic subgroups. This is an invaluable asset for the community and the committee sees many opportunities for public gatherings over and above those that already take place in keeping with Robert Jeffrey's wishes.

- [iv] Expanding these events and opportunities will require additional staff to organize and manage these events as well as specialized staff for marketing, booking and managing the various revenue producing activities.*While greater utilization of the Mansion can be accomplished with asbestos abatement, an elevator and new mechanical and electrical systems, there are limitations of how large certain gatherings can be. At present the fire code allows for 200 people and the maximum workable number for an indoor wedding reception is 128 and only about 40% of the building is being utilized at this time. The Program Committee has not done an analysis of how large various spaces need to be to accommodate this ambitious program. We anticipate working with the Plan Committee after input from the public and the consultants.

Committee Members

Tammy Pedon, Chair
Judy Brachman
Robyn Jones

Ann Brennan
Doug Jackson
Frances Reed

Jeffrey Mansion & Park Master Plan

Appendix 'B'

Finance & Organizational Committee Report



Jeffrey Mansion & Park Master Plan

Appendix 'B'

Finance and Organizational Committee Report

The Finance/Organizational Committee of the Jeffrey Mansion Commission has been assigned the task of structuring and financing a plan that would enable the Jeffrey Mansion and adjacent property to be restored and enhanced in such a way as to be self sustaining. This committee proposes the following.

I. GOVERNANCE

The Jeffrey Mansion and the surrounding grounds are important assets of the City of Bexley and because there are deed restrictions both on the use of the property and on the City's ability to delegate control over the property, we believe that the City must retain ultimate decision-making control over the operation of the facilities. However, we believe that private sector fundraising will be difficult if donors do not have confidence that a structure is in place to assure that adequate community input is available. We, therefore, recommend that:

- a. The day-to-day task of managing the facilities (the portion not used for municipal offices, etc.) be delegated to a Jeffrey Mansion Commission.
- b. A community foundation be created in order to contribute financially to operations of the Mansion and provide a vehicle for community input on the Commission.
- c. The foundation to be a 501(c)(3) nonprofit entity, to facilitate tax-deductible private donations to the Mansion.

Note: The Commission would have the ability, in collaboration with the Parks and Recreation Department, to make recommendations to the City on programs, budget issues, hiring and firing of the Commission employees, and other operational aspects of the Mansion. While the City would not be bound by the Commission's recommendations, it is expected that the City would generally follow such recommendations.

II. FINANCING CAPITAL IMPROVEMENTS

- a. An aggressive private sector fundraising effort should be undertaken to raise a significant portion of the Mansion's capital improvement needs.
- b. Private donations could come in the form of cash, purchase of bonds, sale or gift of life insurance policies, gift of securities, estate gifts, fund raising events, naming rights for capital improvement gifts, etc.
- c. The City should plan to issue general obligation bonds to finance the portion of capital cost that are not paid in advance from private donations.
- d. The City of Bexley should match some portion of the private donations.
- e. The project should be undertaken as a City-controlled construction project.

Finance and Organizational Committee Report - Continued

II. FINANCING CAPITAL IMPROVEMENTS - Continued

Note: The City will be responsible for payment of the general obligation debt as it comes due, thus, if fundraising or other planned sources of revenue ultimately prove insufficient to pay the debt, the City will be liable to make up the shortfall.

III. FUNDING THE OPERATING AND MAINTENANCE EXPENSES

It is our belief that the renovated Mansion will generate sufficient revenues in the form of rental fees and usage charges to cover operating and maintenance expenses. However, it is anticipated that a subsidy may be required by the City. The additional funds should come from:

- a. The City Recreation and Parks budget
- b. Private sector donations received either through annual fundraising efforts or in the form of earnings generated from an endowment fund established for that purpose.
- c. Rental fees for offices and programs created on the premises, third floor and basement of the Mansion (7,000 sq. ft. not presently being rented).

CONCLUSION

We envision this project as a public sector/private sector partnership. Private sector fundraising efforts must be completed before the City can commence construction. Legal counsel will need to review all proposed contracts in order to be sure that tax requirements are satisfied.

Finance/Structure Committee Members

Dr. Chris Masoner
Mike Kilbourne
Jeff McClelland
Peter Halliday, Chairman

Jeffrey Mansion & Park Master Plan

Appendix 'C'

Public Meetings



Jeffrey Mansion & Park Master Plan

Appendix 'C'

Public Meeting #1 Comment Compilation

- Mansion should be more financially sustainable and have space for events.
- Controlled alcohol sales are acceptable at the mansion.
- Renovating existing structure and improving access are good ideas to maximize and possibly expand usable space.
- Sensitively expanding the parking is necessary, with consensus on the north lot and split views on a new south lot.
- Preserving the woods is important.
- Better access and circulation on the grounds and to the mansion is desired.
- City representation and accountability on any new Board is critical.



Jeffrey Mansion & Park Master Plan

Appendix 'C'

Public Meeting #2 Comment Compilations

- Hard surface Pollutant / Run-Off Concern – consider means of filtering parking lot / hard surface run-off – *Comment by Friends of Alum Creek Rep*
- Setback from Alum Creek should be no less than 50'-100' would be more preferable - *Comment by Friends of Alum Creek Rep*
- Park security / lighting / policing / monitoring is desirable and should be considered with the increasing of parking on site.
- Underground parking should be considered (cost may be prohibitive).
- Objections to ANY additional parking in the park.
- It's a jewel-leave the park AS IS – it's a public facility.
- Bexley Women's Club supports the increased parking plan – they had to plan their meetings elsewhere due to the lack of parking.
- Can there be a business plan....specific to event income vs. maintenance expenses.
- Need a tree loss count as a result of the new parking concepts.
- There is a community 'tolerance' for parking close to the mansion vs. on street in the adjacent neighborhoods. Is parking throughout the neighborhoods acceptable? A Commonwealth resident voiced opinion that her residential drive is commonly parked in or blocked by individuals attending Jeffrey Mansion functions.
- Separation of events with alcohol from other park uses (ie. playground, open space, etc).
- Vehicular circulation at mansion and at day camp needs improved for safety of kids and pedestrians.
- Alcohol consumption at events needs to be controlled....HOW?
- Improvements that are undertaken need to be '*done right*'....to the level of quality expected at the mansion.
- Consider utilizing grants, etc to help fund.



Jeffrey Mansion & Park Master Plan

Appendix 'D'

Benchmark Facilities



Bryn Du Mansion

Granville, Ohio

Purchased by Village in 2002 for \$2.4 million

Finances

- State grant of \$200,000 from State Arts Facilities for initial improvements
- Operating budget under \$150,000 (20% Village)
- Capital expenditures
- Rentals (60% of income)
 - o 3 sections of first floor –banquet seating for 90, 60 and 40
 - o Fee for entire first floor - \$1050
 - o liquor provided by caterers



Bryn Du Mansion

Granville, Ohio

Operations

- Non profit with board of community representative
- Management agreement with the Village of Granville
- Executive Director
- Maintenance/grounds person
- Front lawn/polo field collaboratively programmed with Township Parks & Recreation



Oglebay Resort (Mansion)

Wheeling, West Virginia

Earl Oglebay gifted mansion and 780 acres to City in 1926

Finances

- Trust established to manage the property and raise funds, capital improvements, and land purchases
- Institute operates the house
- Rents one large function room, charges for tours
- Capital improvements and some operating funds by Oglebay Foundation



Oglebay Resort (Mansion)

Wheeling, West Virginia

Operations

- “as long as they shall operate it for public recreation”
- property put into a parks District for independence from political influence
- Created a not-for-profit cultural Oglebay Institute to operate in the mansion
- Mounts art exhibits

The Power of the not-for-profit

- Oglebay now 1800 acres
- Budget of \$28 million
- Goal of \$100 million endowment



Look Park

Northampton, Massachusetts

150 acres gifted to the City in 1930

Finances

- Visitor fees, including membership fees
- Grants, Private gifts, Trust fund for upkeep
- No fund from taxes

Operations

- Not-for-profit entity governed by a self-perpetuating Board of Trustees
- Mayor of City is ex-officio member of Board Aesthetic
- Mostly passive park with nodes of activity
- Woods and meadows



Davis Shai House

Heath, Ohio

Gift to City by Dr. Joseph Park Shai, II in 1996

Finances

- \$500,000 State Capital Improvement grant
- \$100,000 capital campaign
- Budget about \$160,000/yr
- \$75-100,000/yr from bed tax
- Rental fees, Income on daily teas



Davis Shai House

Heath, Ohio

Operations

- Not-for-profit Heath Community Arts Council Lease with City
- 4 employees
 - Arts Council – 3
 - City of Heath – Executive director.
- Alcohol served by licensed bartender



Jeffrey Mansion & Park Master Plan

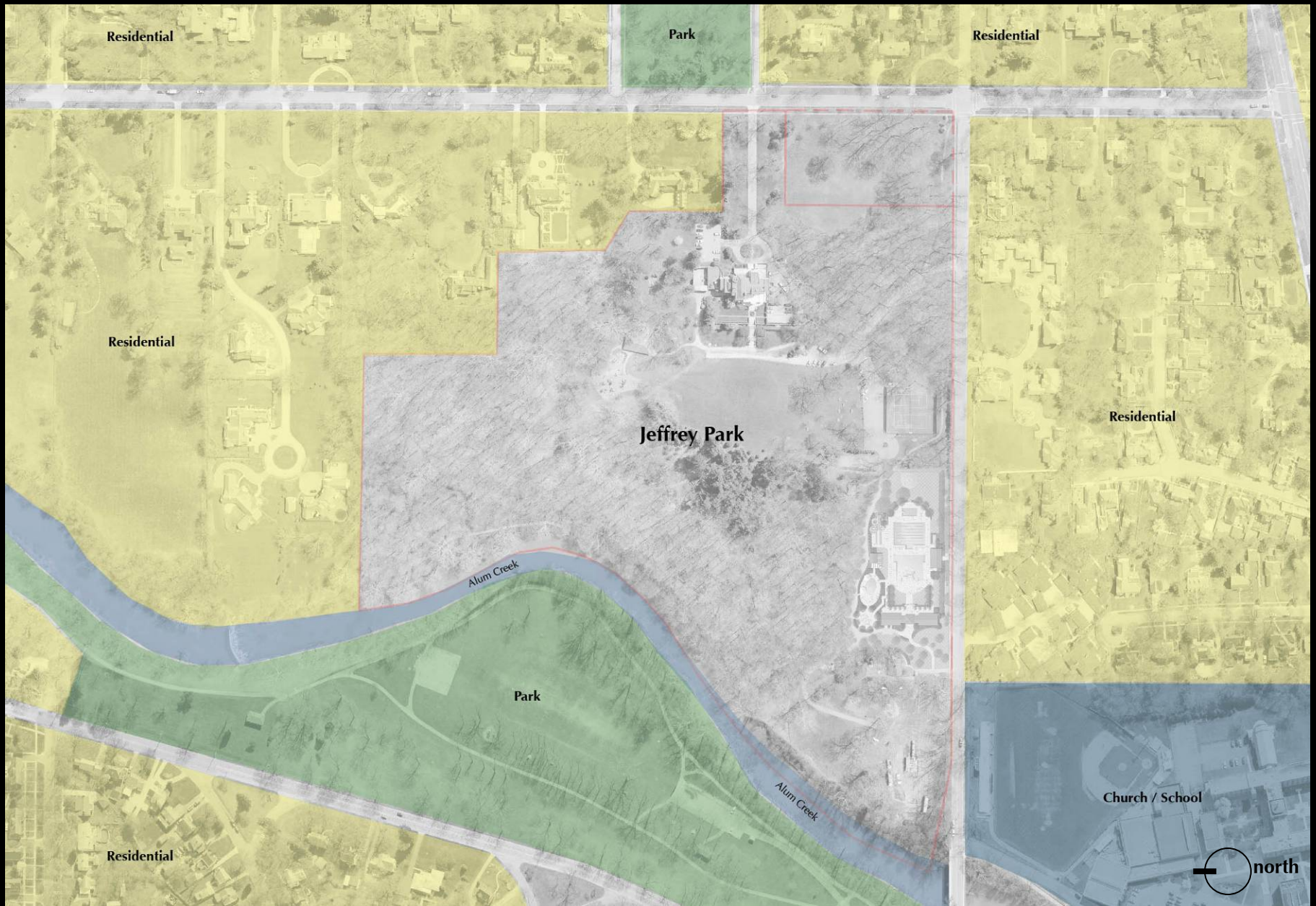
Appendix 'E'

Site Analysis





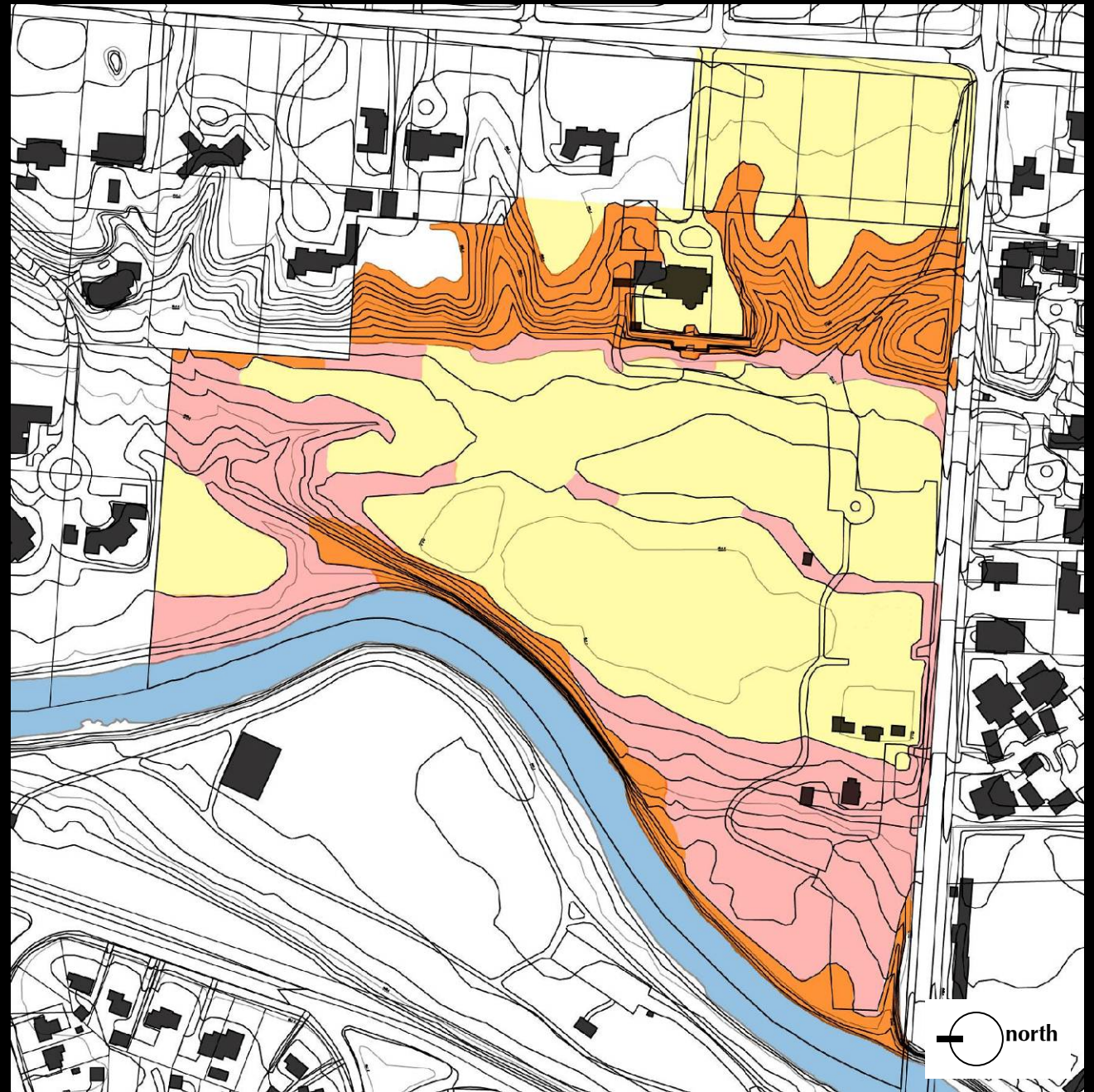
existing conditions air photo



adjacent land-use diagram

Slope Analysis

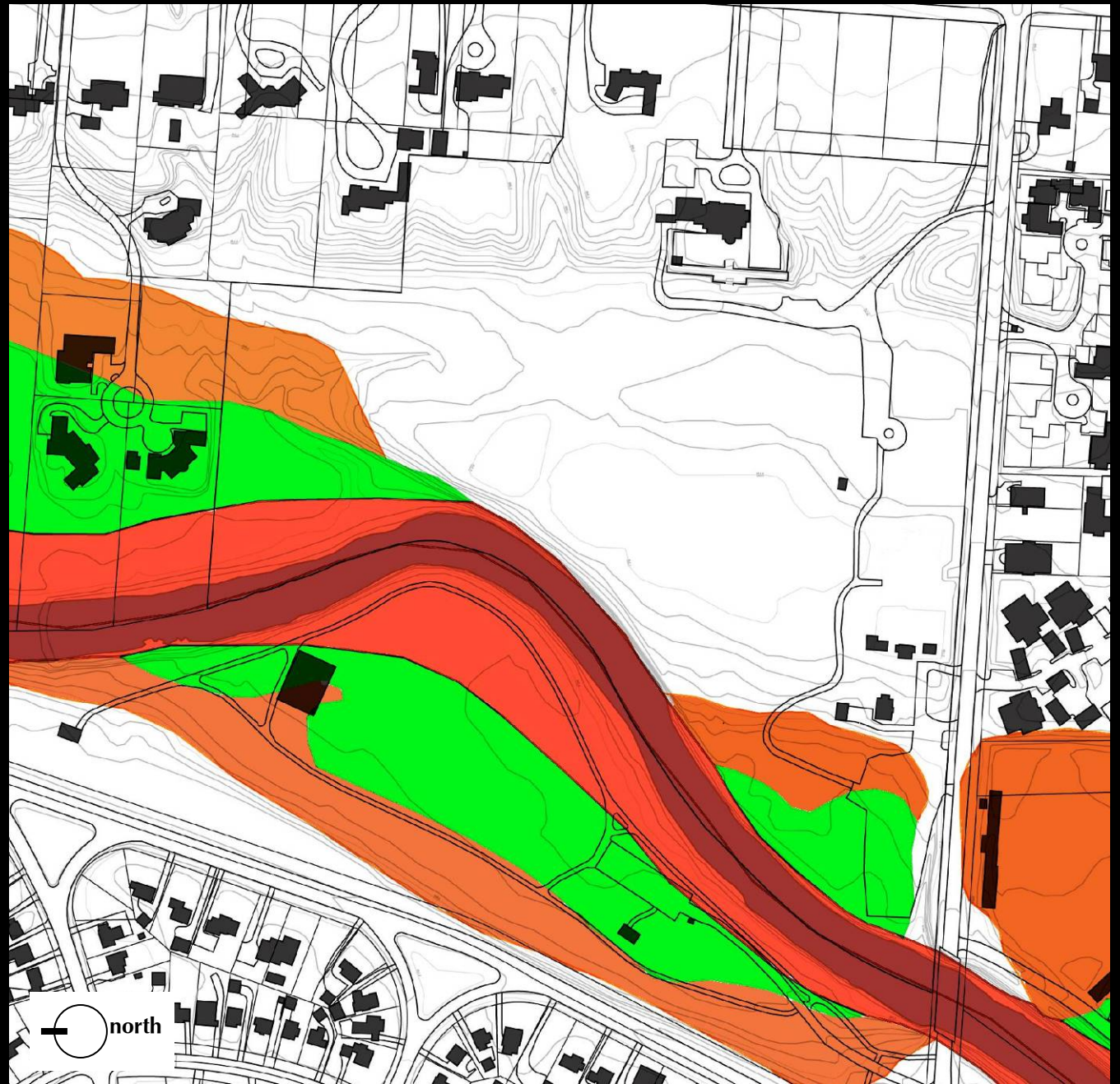
- alum creek
- 0%-5%
- 5%-15%
- > 15%



topography diagram

Flood Legend

- alum creek
- flood way
- 100 year flood
- 500 year flood



alum creek flood diagram



Primary Entrance



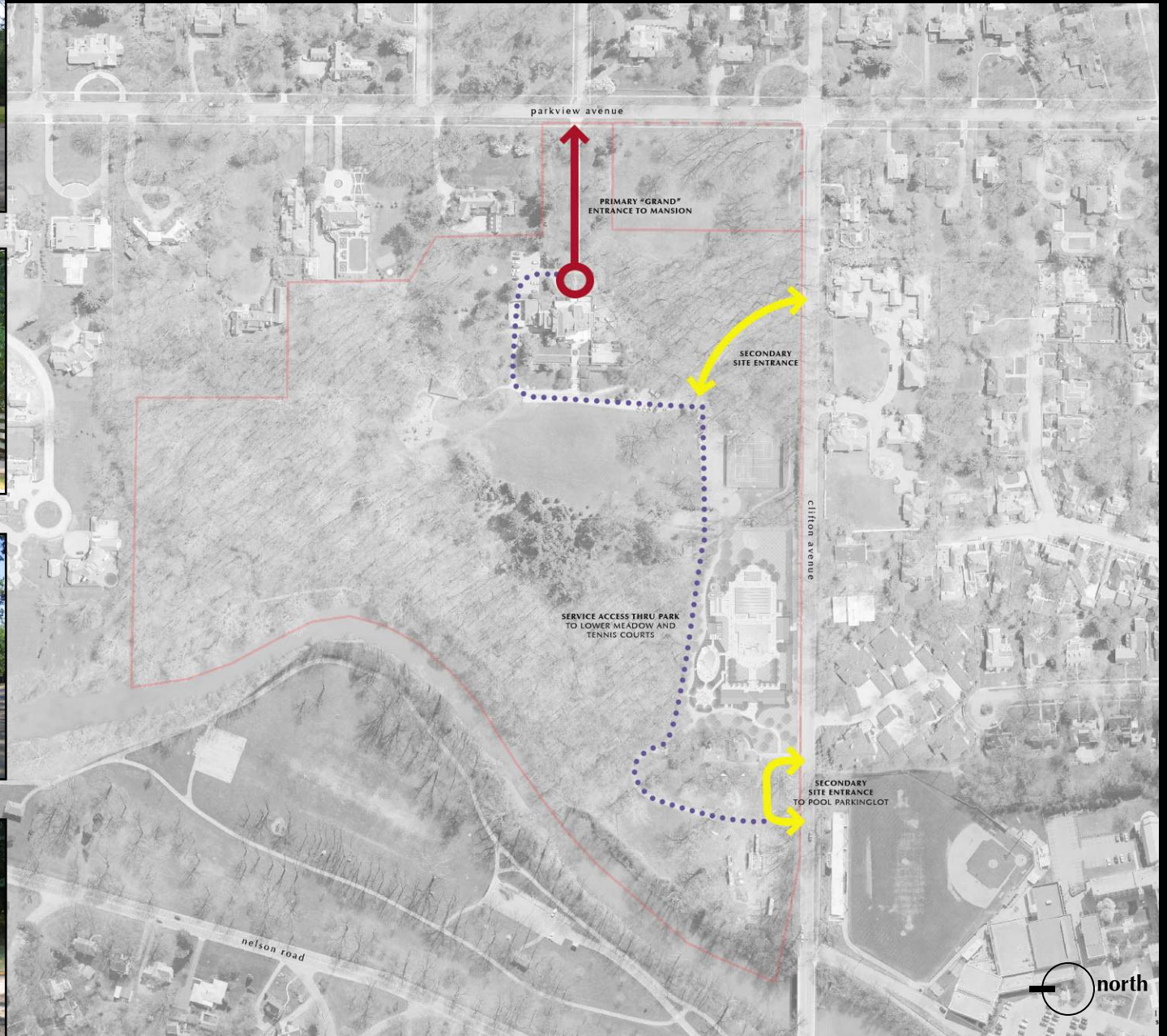
Secondary Entrance



Secondary Entrance



Service Access



site access diagram



'A'-Mansion Guest Parking



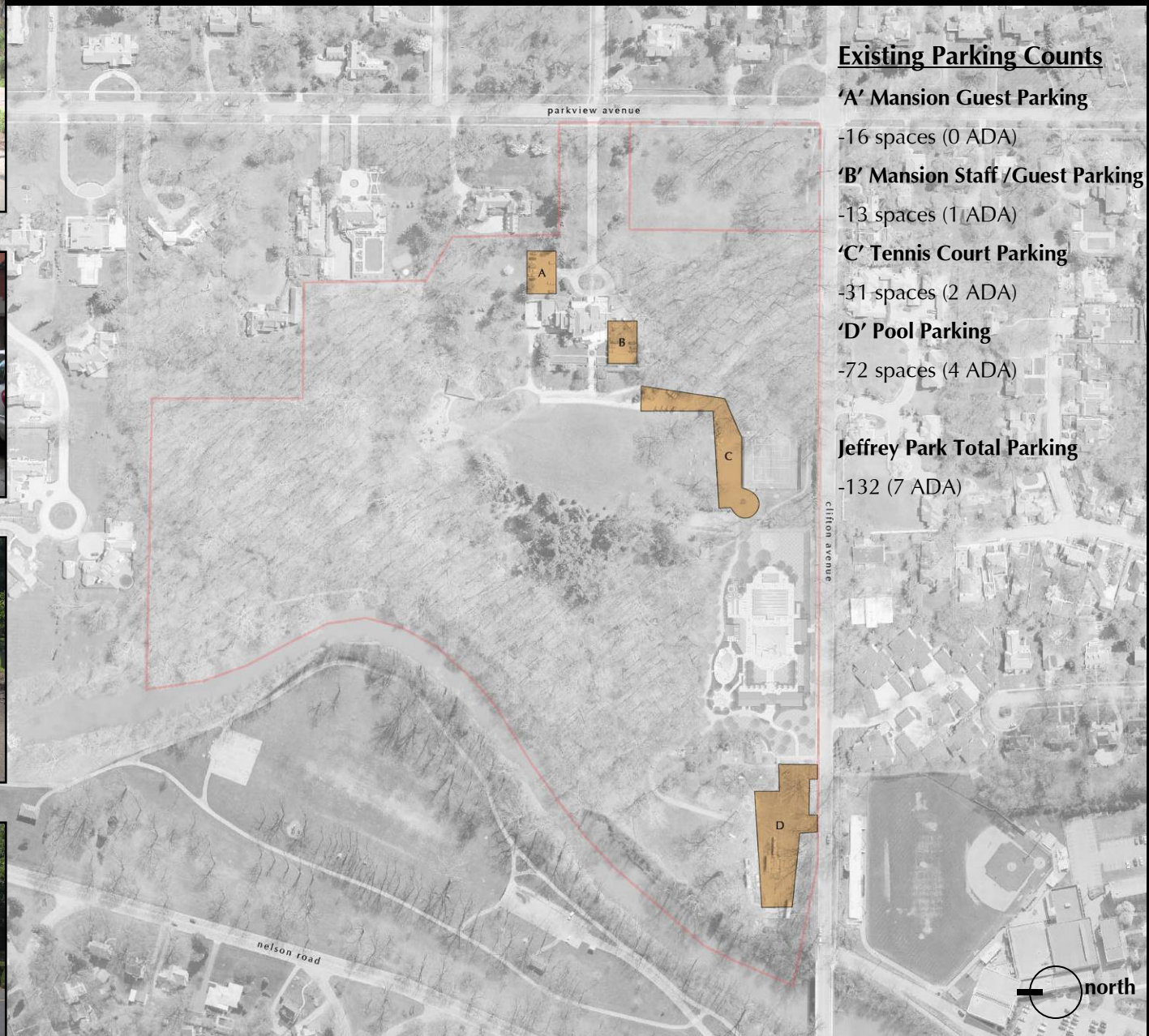
'B'-Mansion Staff / Guest Parking



'C'-Tennis Court Parking



'D'-Pool Parking



Existing Parking Counts

'A' Mansion Guest Parking

-16 spaces (0 ADA)

'B' Mansion Staff /Guest Parking

-13 spaces (1 ADA)

'C' Tennis Court Parking

-31 spaces (2 ADA)

'D' Pool Parking

-72 spaces (4 ADA)

Jeffrey Park Total Parking

-132 (7 ADA)

existing parking inventory



Jeffrey Mansion



Park Shelter



Park Gazebo



Park Restrooms



Pool Mechanical Building (n)



Pool Mechanical Building (s)



Pool Bathhouse



Clifton House





Formal Garden



Playground



Picnic Area



Tennis Courts



Bexley Pool



Clifton House



Day Camp



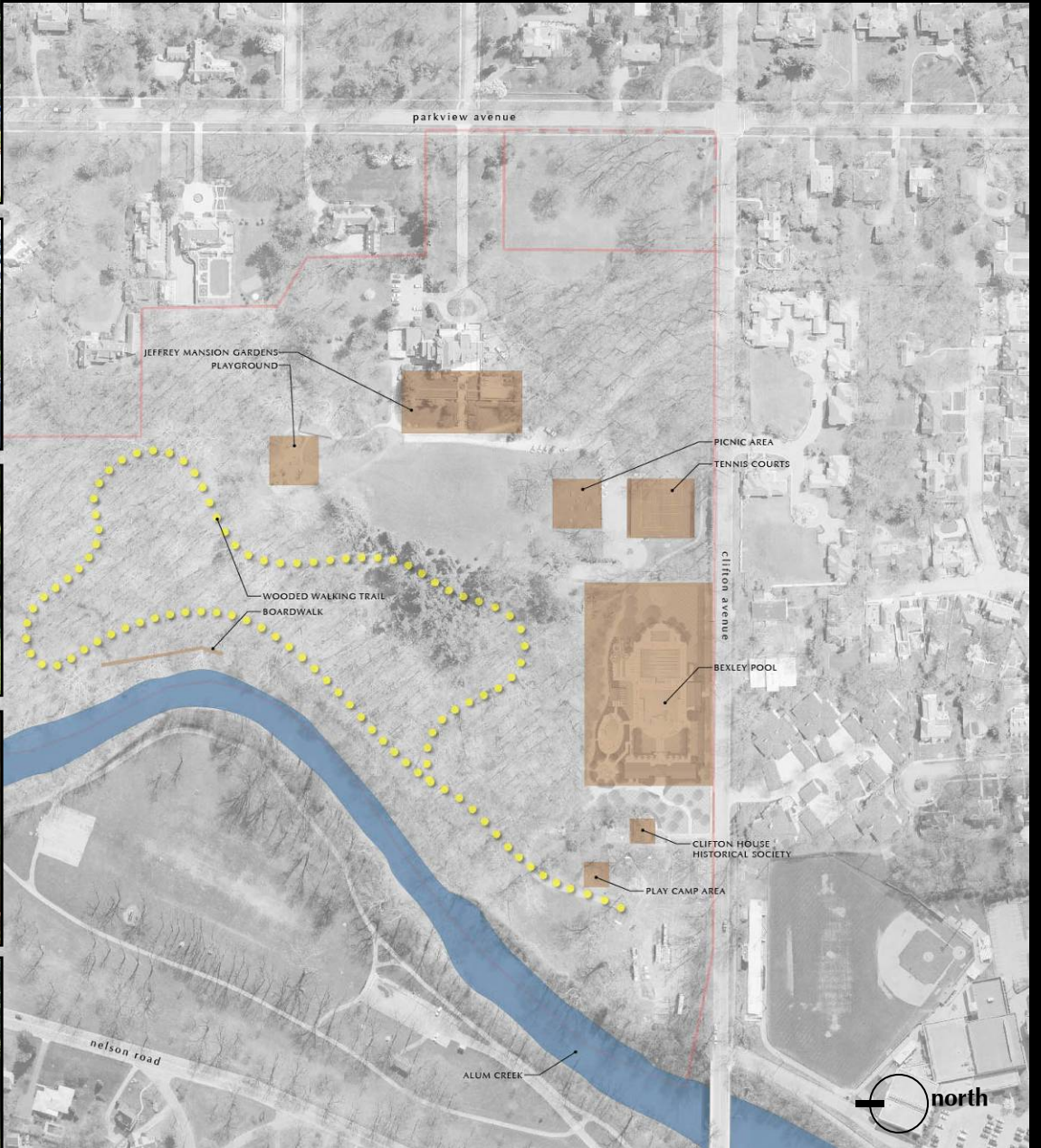
Wooded Trails



Boardwalk



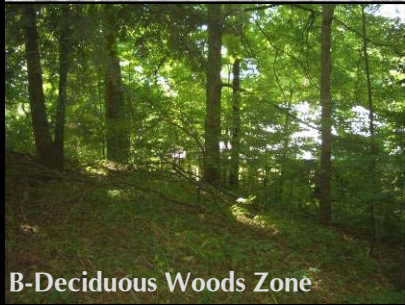
Alum Creek



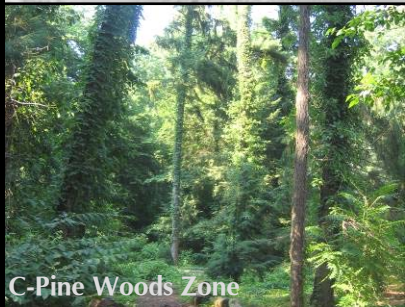
site amenities inventory



A-Open / Maintained Turf Zone



B-Deciduous Woods Zone



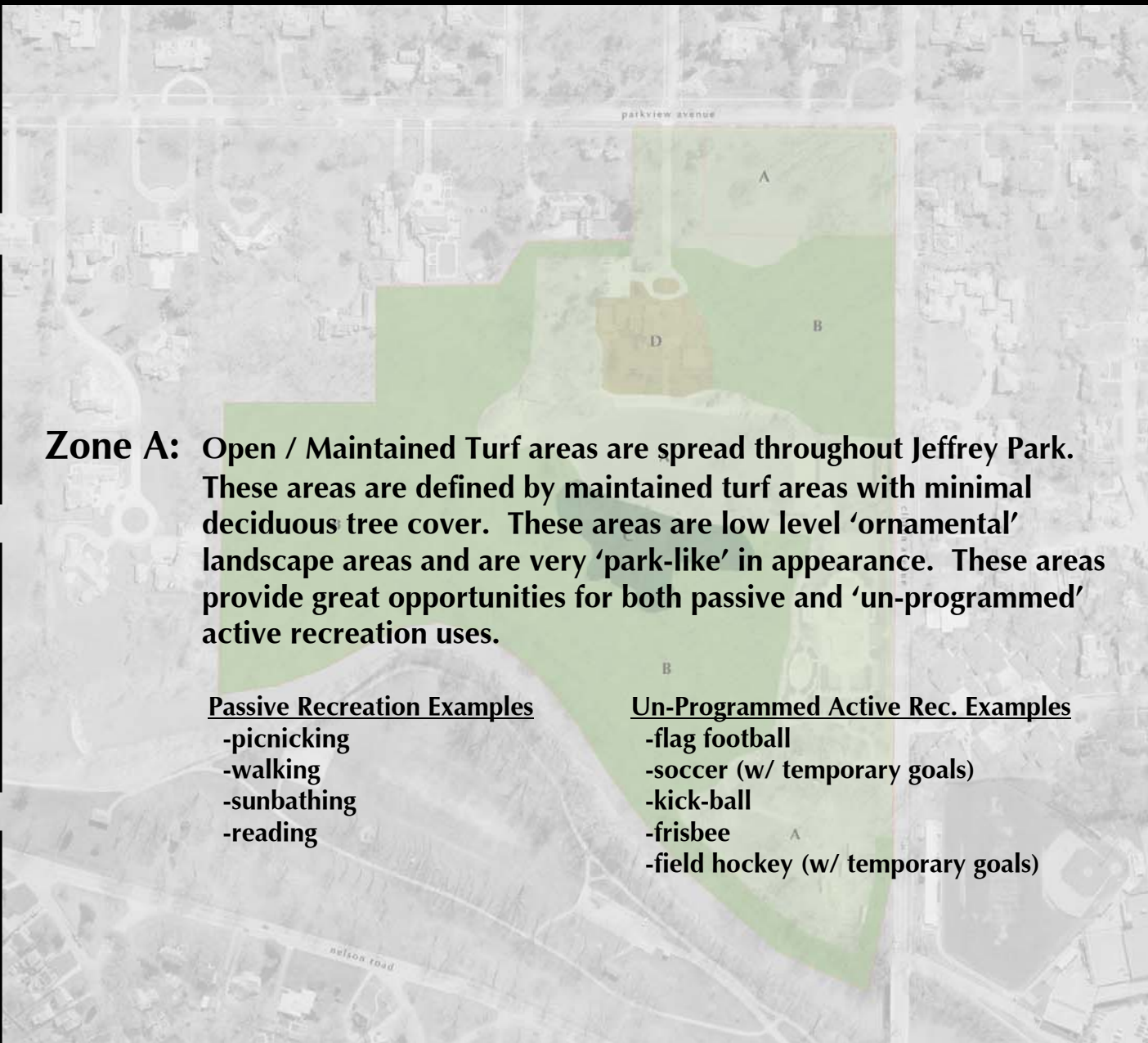
C-Pine Woods Zone



D-Formal Landscape Zone



'distinct spaces' diagram



Zone A: Open / Maintained Turf areas are spread throughout Jeffrey Park. These areas are defined by maintained turf areas with minimal deciduous tree cover. These areas are low level 'ornamental' landscape areas and are very 'park-like' in appearance. These areas provide great opportunities for both passive and 'un-programmed' active recreation uses.

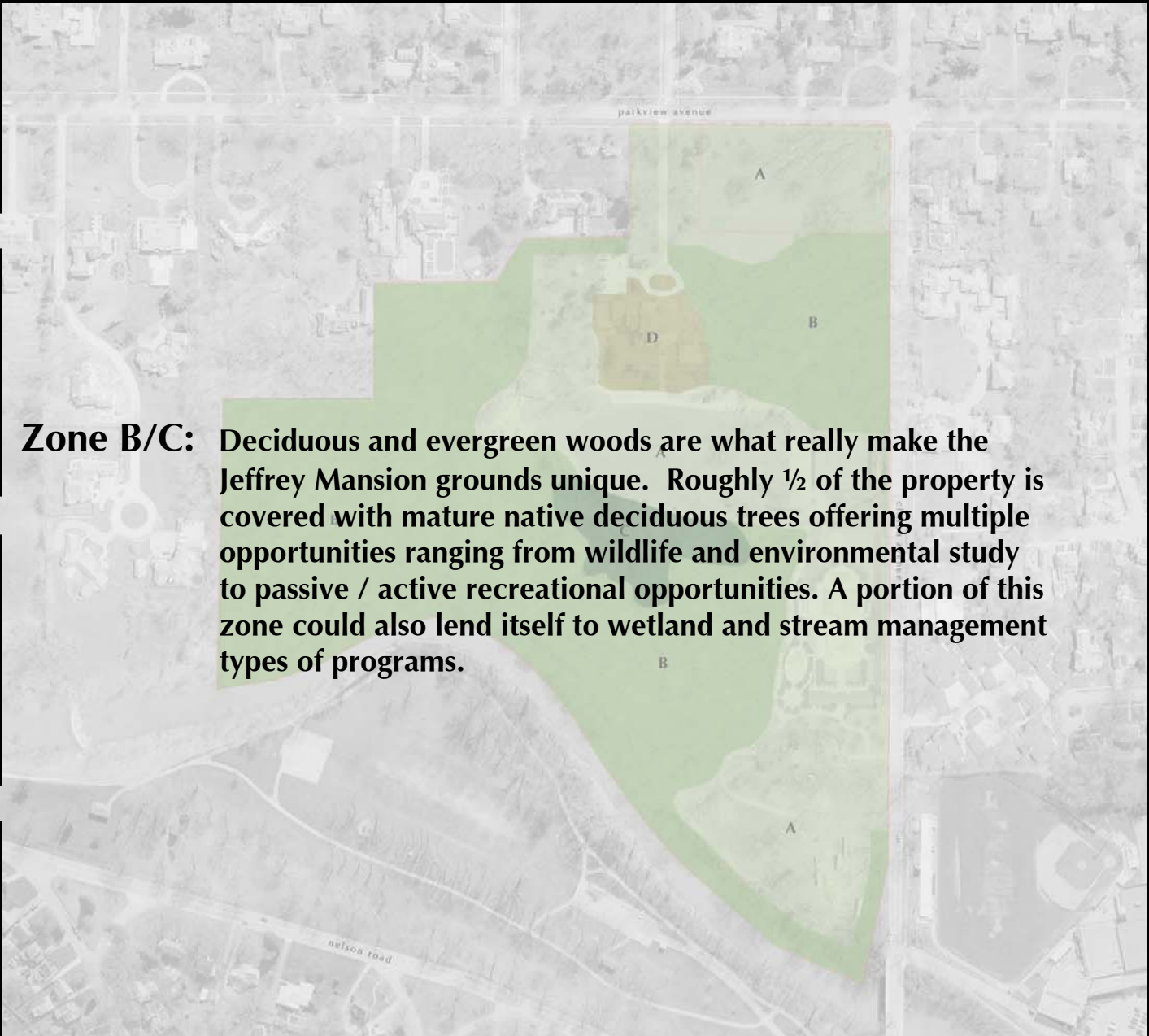
Passive Recreation Examples

- picnicking
- walking
- sunbathing
- reading

Un-Programmed Active Rec. Examples

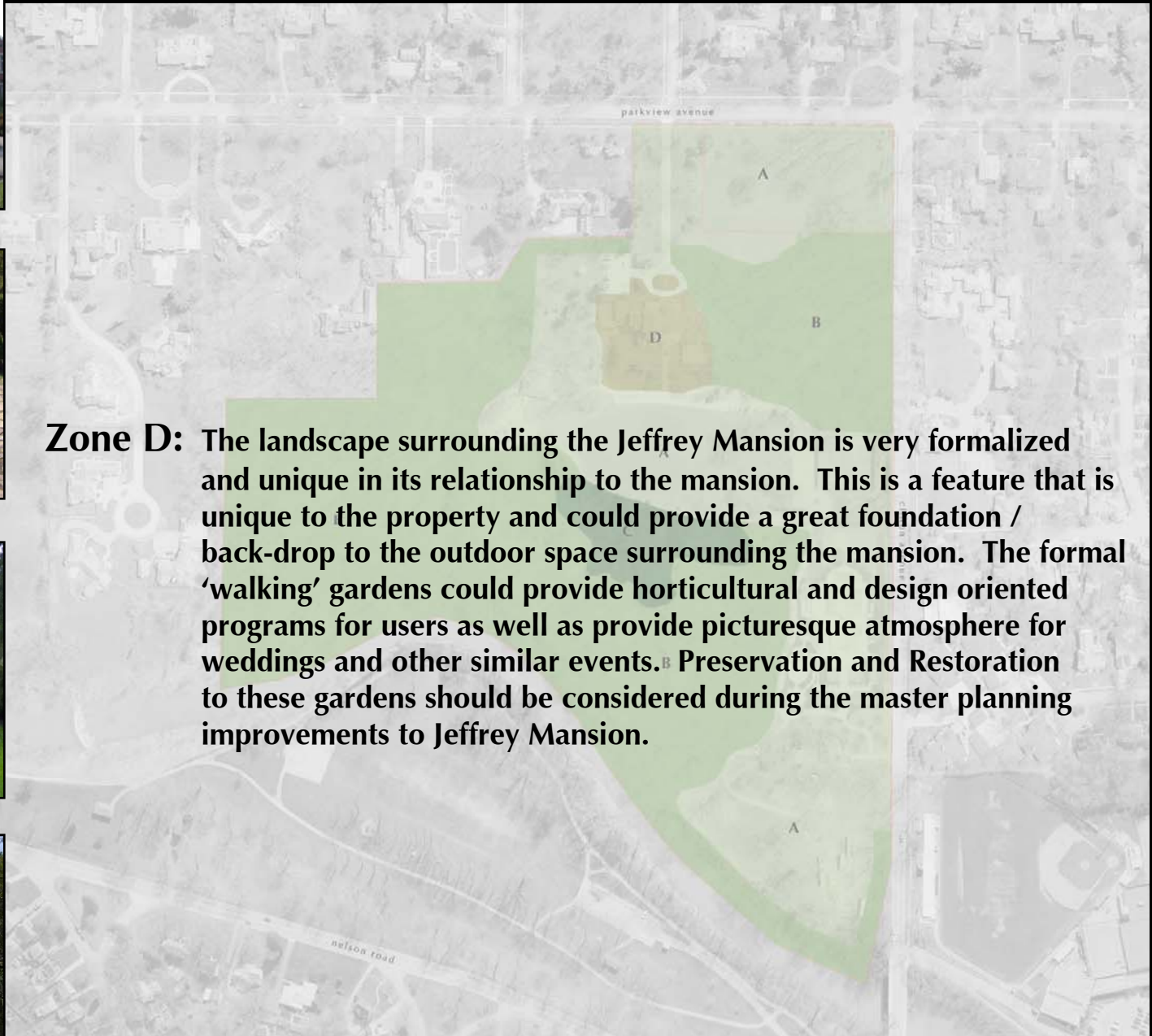
- flag football
- soccer (w/ temporary goals)
- kick-ball
- frisbee
- field hockey (w/ temporary goals)

zone a: open / maintained turf zones



Zone B/C: Deciduous and evergreen woods are what really make the Jeffrey Mansion grounds unique. Roughly 1/2 of the property is covered with mature native deciduous trees offering multiple opportunities ranging from wildlife and environmental study to passive / active recreational opportunities. A portion of this zone could also lend itself to wetland and stream management types of programs.

zone b/c: deciduous & evergreen woods zones



Zone D: The landscape surrounding the Jeffrey Mansion is very formalized and unique in its relationship to the mansion. This is a feature that is unique to the property and could provide a great foundation / back-drop to the outdoor space surrounding the mansion. The formal 'walking' gardens could provide horticultural and design oriented programs for users as well as provide picturesque atmosphere for weddings and other similar events.^B Preservation and Restoration to these gardens should be considered during the master planning improvements to Jeffrey Mansion.

zone d: formal landscape gardens

Jeffrey Mansion & Park Master Plan

Appendix 'F'

Feasibility Study



Jeffrey Mansion & Park Master Plan

Appendix 'F'



PREPARED FOR:

Ms. Donna Laidlaw
Jeffrey Mansion Commission
City of Bexley
2242 East Main Street
Bexley, Ohio 43209

PREPARED BY:

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February 20, 2008

An Outline for Identifying
Conference/Meeting Space
Potential in Bexley, Ohio



Ms. Donna Laidlaw
February 20, 2008

I. INTRODUCTION

Following is a typical outline of the approach and methodology for conducting an analysis of support for a conference/meeting space in Bexley, Ohio. Typical studies identify levels of support for a proposed facility, user profiles, identification of optimum size/location, specialized attributes, potential public benefits, and potential gross revenues/expenses. Food service is a critical part of meeting space marketing and must be considered as either a service of self-supporting component of the project.

Four sources of use and resulting revenue are generally evaluated.

- A. Corporations/organizations from outside the area.
- B. Local corporations and organizations.
- C. Workshops and lecture usage.
- D. Area residents who will use facilities at the complex.

The approach is twofold. The first is a "fair share" approach, based on existing support and competitive components. The study would identify the total market potential for local, regional, and national events and their facility requirements including:

- Size
- Configuration
- Special features
- Amenities
- Recreation requirements
- Food service and lodging

The second approach is the "created" market approach. This approach involves the identification and development of a specific market expertise or opportunity. This is a creative marketing function as opposed to a response to existing customers in the market.

Methodology and conclusions are based on the establishment of an Effective Market Area (EMA), a survey of competitive developments, and an analysis of tourism in the area.

Ms. Donna Laidlaw
February 20, 2008



This entire analysis will establish the total gross revenue "fair share" potential of each activity/ development and identify marketing strategies designed to increase or "create" additional revenue.

II. CONCLUSIONS

- A. Establish an Effective Market Area for the proposed facility.
- B. Establish the level of support for the proposed facility from target consumers, i.e. major employers/ associations/ corporations, etc.
- C. Identify special interest conferences and their level of support for the proposed facility.
- D. Identify optimum size, configuration, and special features.
- E. Identify factors critical for success.
- F. Identify public benefits of the project.
- G. Establish marketing strategies and marketing plan designed to attract the various components of support. Special consideration will be given to both conventional and created opportunities.
- H. Size, type, specialized facilities, target audiences/ markets.
- I. Identify factors critical for success, i.e. golf, lodging, other activities
- J. Food service is considered as either a service to supplement meeting space rentals or as the primary function for dinners, banquets, etc.

III. AREA ANALYSIS

A. SOCIAL, DEMOGRAPHIC, AND ECONOMIC CHARACTERISTICS

- 1. Population trends and projections
- 2. Household trends and projections
- 3. Distribution of households by age and income
- 4. Household wealth
- 5. Employment and unemployment trends
- 6. General information, including schools, major employers, and media
- 7. Existing housing characteristics, including occupancy rates

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B. AREA TRAFFIC PATTERNS

Identification and evaluation of area traffic patterns relative to the proposed site or sites, and their impact on the proposed development.

C. NEW AND PROPOSED DEVELOPMENTS

1. Additional proposed or planned competitive developments and their impact on the proposed development
2. Other collateral development, including roads, shopping centers, buildings, or other economic development

D. TOURISM EVALUATION

Provide a summary of area tourism and its impact on conference support. Area tourism becomes an amenity to the facility and provides activities for participants and their families. The facility could supplement typical "downtown" meetings, conferences, and conventions as a unique dinner/banquet alternative. Information to be collected includes:

1. Type of attractions
2. Attendance figures and trends
3. Amenities/features
4. Seasonal use
5. Number of hotel rooms/restaurants
6. Traveler services

IV. FIELD SURVEY

A. Provide a summary of competitive conference/meeting facilities. Issues of analysis will include:

1. Location/size of facility
2. Amenities/features
3. Price structure
4. Age of facility

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5. User profiles
 6. Average length of conference
 7. Attendance figures and trends
 8. Alternative use of facility
 9. Frequency of use
 10. Specialized training or conference facilities required
- B. Establish factors influencing conference/meeting center operations and their success, and identify components of conference/meeting center support. The four major support components are:
1. Industry
 2. University-related organizations
 3. Associations
 4. General population support
- C. Conduct a survey of major firms and organizations to identify those groups currently using and/or planning the use of conference/training facilities. This component will establish:
1. Criteria for selecting a location
 2. Previous/future locations of conferences
 3. Frequency/dates of conference/meeting use
 4. Sponsor of conference
 5. Average number of attendees
 6. Length of conferences
 7. Likelihood of changing locations
 8. Corporations using their own facilities
- D. A survey of area organizations/special interest groups, educational organizations, and city officials will be conducted to establish their perception/need for a conference/meeting center. The objective of this survey will be to establish the potential usage by these individual organizations.
1. Establish lists of various area organizations
 2. Develop survey instrument
 3. Conduct surveys

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4. Analyze results establishing:
 - a. Potential usage
 - b. Fees to be paid
 - c. Required facilities
 - d. Hours/days of usage

- E. Identify any university-related services and expertise available to assist in attracting major employer/corporations to a proposed facility. Industry specialists as well as retreat facilitators will be interviewed.

- F. Identify local or regional professional specialties capable of attracting additional seminars, workshops, and conferences, such as university professors, corporate executives, and other leaders in their professions. It is important to establish two components for conference/training center support:
 1. Existing support through area schools/universities, service organizations, etc.
 2. Support created through the identification of expertise or opportunity. This component is a marketing function as opposed to a development function. The activity (not the facility) must be identified (even created), then developed, and promoted.

- G. Identify site-related amenities capable of attracting special interest conferences to the proposed site. Due to the uniqueness of the area, opportunities may exist at attract special interest conferences related to leisure activities, communication, data processing, or environmental issues.

- H. Case studies of existing conference centers should be conducted in similar communities.
 1. Name, address, contact person
 2. Identify scheduled conferences
 3. Average length of conferences
 4. Attendance figures and trends
 5. Capital and operating costs
 6. Year opened/built

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7. Funding sources, including public/ private relationships
8. Amenities/features, size
9. Activity/revenue experience
10. Analysis of projected revenue, actual capital costs, and operating expenses
11. User profile
12. Relevant experience