



A Master Plan for the
University Settlement Camp
City of Beacon, NY

USC Master Plan
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Final Version

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CONSULTING**
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THE
Chazen
COMPANIES[®]



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Executive Summary

This document provides a Master Plan and Physical Site Maintenance Plan for the University Settlement Camp property, which the City of Beacon has agreed to operate and maintain as a resource for recreation, education and conservation purposes. The Master Plan process sought to identify the best options for programming on the site given the need to balance expenses and revenues associated with the site. In the end, the Master Plan seeks to answer the following question:

How does the City of Beacon program the University Settlement Camp property to maximize its value to Beacon residents in a financially sustainable manner?

Building and Site Inventory

The Chazen Companies has provided detailed estimates of the cost of needed building and site improvements. These costs and detailed descriptions of the suggested improvements are provided in Appendix B. The total cost of building improvements is estimated at \$733,000. The total cost of site improvements is estimated at \$741,250.

Public Outreach and Stakeholder Involvement

Through a series of three meetings during the Spring of 2009, Fairweather Consulting gathered input for the Master Plan from a variety of stakeholders. Members of the public and representatives from several organizations interested in the site described their ideas about site programming, and about how to make the site financially sustainable. Through several exercises, the results of which are provided in Appendix A, these conversations established a list of proposed uses for the site, and an initial set of ideas about how to support these uses.

Proposed Site Uses

The detailed list of proposed uses is provided in Appendix C. In the end, our analysis suggests that nearly all of the proposed uses could be successful on the site. With few exceptions, the proposed uses would enhance the attractiveness and revenue-generating capacity of the site beyond what those uses would cost to implement.

Local and Regional Recreation Trends

In order to understand the potential market demand for the activities and programming proposed for the site, Fairweather Consulting conducted a scan of local and regional recreation needs and



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spending patterns. This research suggests that within the County there is a relatively high demand for the types of activities suggested for the site. Within the eastern portion of the Lower and Mid-Hudson Valley (including Putnam and Westchester Counties), that demand is even greater, signaling a potential to tap into a much broader market. Similarly, our research suggests that spending on recreation-related goods and services is significantly higher in the area surrounding the property than the national average.

Financial and Physical Feasibility

Each of the uses proposed for the site entails costs (such as building and site improvements and maintenance) and revenues (such as entrance fees or rental fees). Combining our research on recreation trends, the building and site facilities inventory, and the proposed uses from our outreach, we have developed a financial model that estimates the net operating surplus or deficit generated by a given configuration of uses on the site. Based on a number of assumptions, we have determined that, under the existing agreement with NYS Parks, the City cannot feasibly decide to make no changes to the University Settlement Camp property. We calculate, however, that immediate implementation of all needed building and site improvements cannot avoid an annual operating deficit, even with new revenues from programs and uses added to the site. As such, we believe that the only financially viable option is a phased approach to implementing needed site and building improvements on the site.

Master Plan and Physical Site Maintenance Plan

Our recommended configuration of uses on the site is designed to spread the significant costs of building and site improvements over a period of seven years, which allows revenues from site visitation, rentals and activities on the site to grow at pace with increasing costs of improvements and maintenance. The resulting configuration successfully avoids an annual operating deficit at all points during the seven year timeframe of our analysis. Appendix C lists the uses proposed for each of the three phases. Task 6 below documents the annual costs and revenues for each year during each of the three proposed phases. As a way of identifying important factors in successfully operating the USC site, this section also describes how the results of our financial analysis could change given changes in some of our estimates.

Implementation

Finally, we have provided several recommendations related to the implementation of our recommended configuration. From organizing volunteer support for the site to seeking outside funders



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to offset the costs of the site, our high-level implementation plan provides guidance for the City of Beacon to begin transforming the University Settlement Camp property into the valuable community resource it has envisioned.

Introduction to the University Settlement Camp Property

Located in the City of Beacon, on the lower 50 acres of a 100-acre parcel at the foot of Mount Beacon, the University Settlement Camp site boasts a variety of recreational and athletic facilities including:

- a gym,
- a wood shop,
- two open air pavilions,
- a dining hall and kitchen with the capacity to feed 300,
- an infirmary building,
- a dormitory style farmhouse,
- a library,
- a theatre,
- 21 residential cabins, and
- a nature center.

While maintenance and repair is required of these structures, their potential uses as public spaces are numerous and promising.

History of the Property

The University Settlement Camp was established on the site as a residential camp facility in 1910 and originally served as a haven for New York City youth, many of whom traveled to the camp to experience nature for the first time and participate in the camp's philosophy to spread a message of hope, tolerance, and community building. Over the last century, generations of children and young adults have supported the camp as campers, counselors, and volunteers.

The property that housed the camp and its facilities was sold to the New York State Department of Parks and Recreation on January 4th, 2008, in a transaction facilitated by Scenic Hudson. The City of Beacon has managed the University Settlement Camp facilities for one full recreation season since acquiring a portion of the full parcel through an agreement with the New York State Department of Parks and Recreation.

In recent years, though use of some facilities is limited by disrepair, several groups have used the University Settlement Camp for a variety of activities, including a day camp for 4-12 year olds, a residential camp for children aged 8-12, and a meeting place for the annual gathering of Hudson River Sloop Clearwater members.



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Condition of the Buildings and Facilities

While the site has the potential to be a valuable public space, City officials are reluctant to offer a full range of recreation and athletic activities on the site, knowing that there are safety issues with some of the buildings and facilities. Furthermore, the City hopes to avoid setting precedents for the use of the site before it has developed a thorough plan that reviews the broadest array of possible uses and the financial implications of those uses.

Overview of the Master Planning Process

During the Spring of 2009, a team of local consultants and engineers, including Fairweather Consulting (New Paltz) and The Chazen Companies (Poughkeepsie) was selected to prepare the Master Plan. Through this plan, the City seeks to achieve three primary goals:



1. *To develop a vision for the site through input from City residents and the broader community,*
2. *to identify programs and uses for the site that represent the best balance of public support and financial sustainability, and*
3. *to identify the steps necessary to prepare and upgrade the site to facilitate the envisioned uses.*

To achieve these goals, the City of Beacon convened a series of meetings with local organizations and the broader community to discuss potential uses for the site. Drawing on the input gathered through the outreach process and on their examination of the feasibility of proposed uses, the Fairweather Consulting team has developed this Master Plan and implementation timeline for the recommended uses.

Stakeholder & Public Engagement

In order to gather the full range of options for the site, and to identify their priority among City residents and other stakeholders, the Fairweather Consulting team held an initial meeting with local organizations who may wish to offer onsite programming, plus two public meetings on June 3rd and June 17th to review possible programming options and gather feedback and input from the broader public. A project web site, available at <http://uscmasterplan.ning.com>, offers another way for residents and the general public to voice their opinions.



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Master Plan & Physical Site Maintenance Plan

Once potential uses were identified and prioritized through the stakeholder and public outreach meetings, the Fairweather Consulting team took a closer look at the feasibility of potential configurations of the site. While some uses may be unanimously supported, financial considerations involving repairs, maintenance and program operation must be considered. The Master Plan provides estimates of start-up and recurring operating costs required to support the recommended uses, as well as potential income sources to offset these costs. The Master Plan also includes a description of regular maintenance activities that must be completed in the near-term on the site in order to help the City plan and budget accordingly.

Implementation

By the Fall of 2009, with the Master Plan complete, the City of Beacon will begin to implement new programs and site upgrades on the University Settlement Camp site. Over the course of several seasons, the City will take the necessary steps to achieve its vision for the site: *an affordable destination point for individuals committed to teaching, learning, and experiencing ways to live in relationships with ourselves, each other, and the environment.*

Task 1. Building & Facilities Inventory

The University Settlement Camp property comprises over 40 buildings and structures of various sizes and conditions within the 50 acres currently maintained by the City of Beacon. In the final years during which it operated the camp, University Settlement's improvements to the site were minimal. Prior to Fairweather Consulting and the Chazen Companies' involvement in this project, the City had identified some needed improvements, and the City Building Inspector had performed a high-level assessment of needed improvement to the structures on the site. Additionally, the property's caretaker is a valuable resource to the City given his knowledge of the site, its buildings, and their conditions. Beyond these individuals' assessments, little documentation was available regarding the buildings, facilities, and other improvements on the site.

Building Inventory and Assessment

During the late Spring of 2009, the Chazen Companies performed a series of site visits to augment the information provided by the City Building Inspector and the Camp's caretaker. The Chazen Companies' staff gained access to most of the buildings on the site, with the help of the site's caretaker. Through these visits, the Chazen Companies compiled a detailed inventory of 43 buildings



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and structures on the site. For each, observations were recorded regarding the condition of the exterior and the interior of the structure. The following lists the specific building features that were examined during the site visit:

Table 1. Building Features Examined During Site Visits	
<i>Exterior Features Examined</i>	<i>Interior Features Examined</i>
Roofing (type and condition)	Stories (number)
Siding (type and condition)	Floors (type and condition)
Doors (condition)	Walls (interior, type)
Windows (presence, type and condition)	Lighting
Porch (type)	Kitchen (presence)
Foundation (type and condition)	Plumbing (connection)
Steps/Landing (type and condition)	
Source: the Chazen Companies	

The results of the site visit, including a description of the building features observed, are provided in Appendix B. Based on the presence and condition of these features, the Chazen Companies assigned an overall condition to each building, indicating whether the building is in sound condition and requires only minimal cosmetic improvements, is in need of repairs, or is structurally unsafe and should be removed. A Building Inventory & Condition map was developed based on this initial assessment of the condition of each building on the site. This map (see Appendix B for the full-size map) later became the base map used to gather input from various stakeholders and the public on the best uses for the site.

Estimated Costs of Building Improvements

Based on their site visits and assessments of needed improvements, the Chazen Companies has developed estimated costs for making the needed building improvements. These estimates are an important part of the financial and physical feasibility assessment (see Task 5 below), since they are costs that must be incurred in order to implement new uses throughout the site.

The table below shows the cost of improvements for the buildings in each of the sixteen main areas of the University Settlement Camp. The general condition is color-keyed to match the site maps that were used for the group exercises during the Stakeholder Meeting and the Public Meetings.



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**Table 2.
 Cost Estimates For Recommended Building Improvements**

<i>Building ID</i>	<i>Name</i>	<i>Building Number</i>	<i>General Condition</i>	<i>Expected Cost</i>
1	Nature Center*	14	Green	\$0
2	Lower Eagle Bungalow	15	Yellow	(\$17,500)
3	Lower Eagle Bungalow	16	Yellow	(\$17,500)
4	Lower Hawk Bungalow	17	Yellow	(\$17,500)
5	Lower Hawk Bungalow (Outdoor Ed Ctr)	18	Yellow	(\$17,500)
6	Robin Bungalow	21	Yellow	(\$32,500)
7	Robin Bungalow	19	Red	(\$8,750)
8	Robin Bungalow	22	Red	(\$8,750)
9	Cardinals Bungalow	20	Yellow	(\$22,500)
10	Cardinals Bungalow	23	Yellow	(\$22,500)
11	Bungalow Pavillion	25	Yellow	(\$10,000)
12	Swans Bungalow	28	Yellow	(\$15,000)
13	Swans Bungalow	29	Yellow	(\$15,000)
14	Swans Bungalow	30	Yellow	(\$12,500)
15	Swans Bungalow	31	Yellow	(\$12,500)
16	Lodge	27	Green	(\$9,000)
17	Southeast Building	39	Red	(\$8,750)
18	Bungalow	32	Yellow	(\$17,500)
19	Bungalow	33	Yellow	(\$22,500)
20	Bungalow	34	Yellow	(\$22,500)
21	Bungalow	35	Yellow	(\$12,500)
22	Stover Theatre	37	Green	(\$7,500)
23	Bath Bungalow	42	Green	(\$12,500)
24	Bath Bungalow	44	Green	(\$12,500)
25	Bath Bungalow	45	Green	(\$12,500)
26	Library	13	Green	(\$15,000)
27	Pool	12	Green	(\$7,500)
28	Filter Shed	12A	Green	(\$3,500)
29	Changing Rooms for Pool		Green	(\$750)
30	Pool Toilets	11	Green	(\$1,500)
31	Whitehouse Building*	6		\$0
32	USC Main Kitchen	7	Yellow	(\$87,500)
33	USC Main Dining Area	8	Yellow	(\$20,000)
34	Infirmery	9	Yellow	(\$37,500)
35	Ampitheater	10	Green	(\$17,500)
36	Workshop	1	Green	(\$1,500)



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**Table 2.
 Cost Estimates For Recommended Building Improvements**

<i>Building ID</i>	<i>Name</i>	<i>Building Number</i>	<i>General Condition</i>	<i>Expected Cost</i>
37	Resident's House	46	Green	(\$3,000)
38	Pavillion	5	Yellow	(\$22,500)
39	Gym	4	Yellow	(\$80,000)
40	Office	3a	Green	(\$12,500)
41	Toolshed		Yellow	(\$1,250)
42	Woodshop	2	Yellow	(\$25,000)
43	Art Studio	3c	Yellow	(\$25,000)
44	Adventure Course		Yellow	(\$22,500)

Source: The Chazen Companies
 * These buildings are subject to exclusive use by tenant, as per the City's agreement with Clearwater.

Site Constraints

The condition of several buildings on the site is cause for concern, and, as documented in the Building Inventory and Assessment, the Chazen Companies has recommended removal or demolition of three bungalow buildings. This information is an important part of the overall master planning process for the site, since it suggests that no uses should be planned for buildings that are in poor condition, and that buildings that require significant improvements will entail a higher cost for the City, should they be the focus of future site uses.

In addition to the constraints on uses imposed by the condition of the site's buildings, the Chazen Companies has identified several site-wide constraints that are incorporated later in this report as we sought to identify the physical feasibility of proposed site uses. These site constraints are described below.

Drainage – particularly evident during the spring were the drainage issues throughout the University Settlement Camp property. These issues most directly affect three major aspects of the site: the unimproved roads in the back portion of the site, which have been eroded and are currently unsuitable for most vehicles; the central portion of the main field on the site, which remains wet and spongy well after even a modest rainfall; and the infirmary building, which has sustained water damage, rot and mildew as a result of a water-course that has formed directly beneath the building.



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Vehicle Access – partly due to the drainage issues discussed above, the back portion of the site, which includes the bungalows, the lodge and the nature center is difficult to access due to the poor condition of the roads in that portion of the site. Erosion is the major culprit, and remediation, which should include culverts and swales to divert runoff, could be costly.

Parking – currently, the site has only minimal parking, even with the recent addition of a parking lot near the swimming pool area. While the portions of the main field not affected by the drainage issue described above can and currently are used for parking when needed, this is not an ideal long-term solution since it prevents the simultaneous use of the fields and other site facilities, and since the main field is not in close proximity to several key resources on the site.

Sewer – the University Settlement Camp property is not currently connected to the City’s municipal sewer system, though it appears that the system runs adjacent to the site. The site’s buildings and facilities are now served by aging septic systems, which have not been properly maintained. We have not been informed by the City of any issues with the current system, and it is expected that the system can continue to handle the relatively low flows currently produced by the site’s uses. However, a significant increase in site usage could run up against this constraint.

Estimated Costs of Site-wide Improvements

As with the estimates for the cost of building improvements, estimated costs for site-wide improvements are an important part of our assessment of the physical and financial feasibility of potential programs and site uses. Table 3 provides the estimated cost of each site improvement.

Table 3. Cost Estimates for Recommended Site Improvements		
<i>Name</i>	<i>Description</i>	<i>Expected Cost</i>
Parking	New parking lot to accommodate additional site visitation	(\$22,500)
Clearing	Cost of clearing brush and trees to prevent additional damage to buildings and improve safety of the site	(\$27,500)
Temporary Roads	Temporary road access to rear portion of the site to access bungalows and nature center	(\$47,500)
Permanent Roads	Permanent gravel roads throughout site	(\$110,000)
Drainage	General improvement of drainage throughout the site	(\$125,000)
Lighting	Improved lighting throughout the site	(\$150,000)
Signage	Improved signage throughout the site	(\$7,500)
Sewer	Municipal sewer connection	(\$225,000)
Source: The Chazen Companies		



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Additional details regarding these estimates and the building improvements cost estimates are provided in the Physical Site Maintenance Plan. It is important to note that these estimates are based on the Chazen Companies site visits and preliminary assessments. The actual costs of improvements will vary from these costs, and we highly recommend that the City of Beacon performs detailed structural analyses in order to verify these estimates, particularly for the most costly improvements.

Task 2. Public Outreach & Stakeholder Participation

Based on conversations with the City Administrator, Fairweather Consulting's overall approach to the Master Plan for the University Settlement Camp placed an emphasis on dialogue with the numerous individuals and organizations who share an interest in the City's use of the site. As outlined in the Fairweather Consulting team's proposal, this interest led us to develop a Public Outreach & Stakeholder Participation plan as one of the first steps in the project.

This plan identified three primary ways in which our team would both gather information and feedback from, and communicate to, important stakeholder groups interested in this project.

- A public web site
- A stakeholder meeting with interested community organizations
- Two public meetings

In addition to these three means for gathering stakeholder input, the Fairweather Consulting team also engaged in numerous conversations with City officials affiliated with the site, from the Recreation Department to the Highway Department and the site caretaker. Through the outreach process, our team gathered valuable insight into the existing condition of the site, the best and most promising potential uses of the site, and the impacts that matter as residents of the City weigh the costs and benefits of operating the site.

The University Settlement Camp Master Plan Web Site

During the first two weeks of the project, Fairweather Consulting constructed an interactive public web site using a tool called Ning. The site acts as both a passive place for residents to browse anonymously, and to download documents related to the plan, and as an active home for discussion and conversation that informs the planning process. To promote the site to area residents, Fairweather Consulting reached out to the organizers of the Beacon Citizens Network, a similar online



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forum that encompasses the full range of topics related to the City of Beacon. We also linked the project site to the City's official web site.

During the course of the project, the Master Plan Web Site was updated regularly with news and documents related to the project. The site calendar was used to announce and coordinate the public meetings, which were held in June. As well, the site will continue to be a resource for future planning and implementation. When finalized, this report and any accompanying appendices and presentations will be posted to the site.

As of September 2009, there were 38 registered members of the University Settlement Camp Master Plan web site. The site will continue to be maintained by Fairweather Consulting through the end of 2009, and, if desired, Fairweather Consulting will work with the City of Beacon to transition administration of the site for future use.

The Stakeholder Meeting

Since the goal of the master planning process is, in part, to identify the potential uses that could feasibly be implemented on the USC site, Fairweather Consulting proposed to hold an initial meeting with all local organizations that were considered potential partners in developing new uses for the site. This initial meeting involved a diverse group of stakeholders, including representatives from the City, New York State Parks and Recreation, the Clearwater, Scenic Hudson, the Beacon Community Center, the Girl Scouts, Kids Place, Cornell Cooperative Extension, the NY/NJ Trail Conference, and the Beacon Institute. In addition to City employees, there were 10 participants at the Stakeholder Meeting.

During the Stakeholder Meeting, Fairweather Consulting facilitated the group in the completion of a series of exercises to identify potential uses for the site, and to consider the best means for supporting and developing these uses. The materials used to facilitate the meeting are included in Appendix A. The results of the exercise – the groups' proposed uses – are discussed in detail later in this report, as part of Task 4 – Proposed Uses.

Public Outreach Meetings

Following the Stakeholder Meeting, Fairweather Consulting worked with the City to plan and prepare for two public meetings. Fairweather Consulting assisted the City in its efforts to promote public attendance by developing press releases and posting information about the meetings on the project



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web site. As well, the City spread the word by announcing the public meetings during City Council meetings and workshops.

The Public Meetings differed from the stakeholder meeting in two ways: first, residents from within and beyond the City of Beacon were invited to attend, regardless of their affiliation with organizations who might have a specific interest in the site, and second, the meetings were geared directly toward gauging public support for the uses discussed during the stakeholder meeting. However, participants were also able to add to the pre-defined uses their own ideas on how the site might be used, and how those uses might be supported financially. A total of 46 people participated in the two Public Meetings, which were held on June 3 and June 17, 2009.

The materials used to facilitate the two Public Meetings were posted to the project web site, and are included in Appendix A. As with the stakeholder meetings, the uses and sources of support identified by meeting participants are discussed in detail under Task 4 – Proposed Uses.

Task 3. Proposed Site Uses

The public outreach and stakeholder engagement meetings described in Task 2 were the primary means for gathering ideas about the best uses for the University Settlement Camp property. Through these meetings, a wide range of potential uses was identified. Examples range from primitive camping on portions of the site near the abutting Hudson Highlands State Park to a full-service restaurant at the White House and bed and breakfast in the Lodge.

The following list describes the uses proposed by participants in the three meetings. Also indicated is the general portion of the site in which each building is situated.

Table 4. Proposed Uses by Area		
<i>Proposed Use</i>	<i>Description</i>	<i>Proposed Area</i>
Art studio space	Available as an additional space for rent by camps using other site facilities	Art Studio
Art studio	Local 'artist in residence'	Art Studio
Other rental opportunities	Miscellaneous rentals	Infirmary
Overnight Camps	Like Michigan Tech rental from 08	Infirmary
Private events at the Lodge	Corporate or other events	Lodge
Hiking base/	Use the Nature Center as an interpretive center for local ecology of	Outdoor Education



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**Table 4.
Proposed Uses by Area**

<i>Proposed Use</i>	<i>Description</i>	<i>Proposed Area</i>
headquarters	the Highlands and the Hudson	Center
Nature Center space	Available as an additional space for rent by camps using other site facilities	Outdoor Education Center
Environmental Education	Free hands-on environmental education classes offered by City or the BCC, 15 students per week for 5 month period	Outdoor Education Center
Community Gardens	Plot size = 20x20. 60 plots is 24,000 sq ft or approx. 1/2 acre	Open Space
Movies in the Park	Free movies to attract attention and increase site visitation	Open Space
Hiking, biking, skiing trails		Open Space
Picnic areas		Open Space
Festivals and concerts		Open Space
Sculpture Garden		Open Space
Private events at the Pavillion		Pavillion
Public swimming	Pool admission covered in site entrance fee. 50% of total hours (June - Aug) available for public swimming	Pool Area
Private pool rental	40% of total hours (June - Aug) available for private rental to orgs or camps	Pool Area
Swim lessons	Classes offered by City or the BCC, 10% of total hours (June - Aug), paid at hourly rental rate.	Pool Area
Food Concessions		Pool Area
Art Shows	Free event to attract visitors	Stover Theatre
Movies	Two movies per season	Stover Theatre
Private events at the Theater	Rental not associated with camp	Stover Theatre
Private events at the Amphitheater		Stover Theatre
Dance	Dances sponsored by the City or BCC	Stover Theatre
Theater space	Available as an additional space for rent by camps using other site facilities	Stover Theatre
Private events at the Bungalows	Corporate retreats and other private rentals	Bath Bungalows
Boy/Girl Scouts or Other Overnight Camps	Camp rental	Bath Bungalows
Clearwater headquarters		Whitehouse Main Building
Hikers Cabins/Camping	Rental cabins available for people interested in outdoor activities, primarily on Mt Beacon or in the Hudson Highlands State Park.	Main Bungalow Area
Overnight Camps		Main Bungalow Area
Local history center	Use the library as an interpretive center for local history of the Beacon/Hudson Highlands region.	Library



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**Table 4.
Proposed Uses by Area**

<i>Proposed Use</i>	<i>Description</i>	<i>Proposed Area</i>
Environmental Education	Free classes offered by City or the BCC, 10 students per week for entire season	Library
Kitchen space	Available as an additional space for rent by camps using other site facilities	USC Main Kitchen
Commercial Kitchen	Hourly rental for use as a commercial kitchen by local restaurants or food producers.	USC Main Kitchen
Dining room space	Available as an additional space for rent by camps using other site facilities	USC Main Dining Room
Gym space	Available as an additional space for rent by camps using other site facilities	Gym
Athletic Events	Space to host events of local or regional athletic groups	Gym
Dance Classes	Classes offered by City or the BCC, 10 students per week for entire season	Gym
Sports Fields		Open Space
Adventure Course	Classes offered by City or the BCC, 15 students per class, one class per week for season	Adventure Course
Gymnastics Classes	Classes offered by City or the BCC, 10 students per week for entire season	Gym
Cooking classes	Classes offered by City or the BCC, 20 students per class, 1 class per month for 5 months	USC Main Kitchen
Woodworking Classes/Workshops	Classes offered by City or the BCC, 20 students per class, 1 class per month for 5 months	Woodshop/Office Area
Woodshop Space	Available as an additional space for rent by camps using other site facilities	Woodshop/Office Area

Source: Fairweather Consulting

Through the exercises that Fairweather Consulting facilitated during the meetings, the proposed location of these uses were indicated on a map of the site that depicted the overall condition of the buildings. The maps generated through this exercise are provided in Appendix A.

These proposed uses are the basis for our analysis of the financial and physical feasibility of potential site configurations. For the most part, none of these uses strictly precludes any other use on the site. In several cases, multiple uses are proposed for the same area of the site, however, we believe that these uses are either compatible as simultaneous uses (e.g. some bungalows could be rented by hikers while others are used for a camp group) or that the frequency of any one use proposed for an area is low enough that scheduling conflicts are likely to be rare.



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While all of the suggested uses appear to be physically feasible on the site, given the appropriate site or building improvements, our review of the costs associated with operating and maintaining each use suggests that some of the proposed uses are not cost-effective. In some instances, the proposed programs are likely to entail added insurance costs that are too great to justify their implementation. In other cases, a proposed use may not be financially feasible immediately, but may be cost-effective in the future, as awareness of the site and, consequently, visitation and use of the site increases.

Task 4. Local & Regional Recreation Trends

Fairweather Consulting collected available data from existing sources to develop a general sense of the trends in recreational activity among local and regional populations. This data served as a baseline for the public outreach and stakeholder involvement process and helped to ensure that the full range of possible options for the site is considered and weighed during the planning process. It is also an important baseline for the financial analysis of the proposed uses, since most of the revenues generated at the site will be driven by the scale of market demand.

The sources consulted included the following:

- Results of the community survey for the 2007 City of Beacon Comprehensive Plan that addressed parks and recreation topics;
- The New York State Office of Parks, Recreation and Historic Preservation's 2008 State Comprehensive Outdoor Recreation Plan
- Consumer Expenditure Estimates for Recreation created by ESRI Business Analysts, a commercial database
- The National Sporting Goods Association's Sports Participation Survey

In general, the national, state, regional and local trends indicated by these sources all support the idea that the University Settlement Camp property should be able to sustain a fairly robust level of attendance and participation. Our analysis focused on those activities which could be supported at the USC site. For example, while boating and fishing are including in most recreational survey results, we did not include those given the sites lack of water access. Similarly, the analysis did not include recreational activities which would require capital investments beyond restoration and renovation of existing facilities. Thus, such activities as bowling, golf and field sports such as baseball, football and soccer are de-emphasized in this market analysis. That being said, current



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recreational trends emphasize a number of passive and active uses that could easily be accommodated without substantial new capital investments.

General National Trends

The National Sporting Goods Association (NSGA) conducts an annual survey on participation in recreation. The survey looks at those over seven years of age who participate in an activity more than one in the year of the survey. Table 1 shows the results of the 2008 national survey, listing recreational activities ranked in order of popularity. Note that the two most popular activities (exercise walking and swimming) could easily be accommodated at the USC site. Other popular recreational activities that the site could lend itself to are camping, bicycle riding, hiking, aerobic exercising and running and jogging. The appendices to this report include a further breakout of the NSGA survey results, providing results by activity from 2002 to 2007.

Table 5. 2008 Participation - Ranked by Total Participation					
<i>Sport</i>	<i>Percent</i>		<i>Sport</i>	<i>Percent</i>	
	<i>Total</i>	<i>Change</i>		<i>Total</i>	<i>Change</i>
Exercise Walking	96.6	7.60%	Backpack/Wilderness Camp	13	-0.10%
Swimming	63.5	6.10%	Softball	12.8	3.60%
Exercising with Equipment	63	9.20%	Tennis	12.6	2.90%
Bowling	49.5	5.10%	Volleyball	12.2	1.00%
Camping (vacation/overnite)	49.4	3.80%	Football (tackle)	10.5	-3.70%
Bicycle Riding	44.7	11.40%	Canoeing	10.3	na
Fishing	42.2	2.70%	Mountain Biking (off road)	10.2	9.60%
Workout at Club	39.3	6.80%	Scooter Riding	10.1	-4.60%
Hiking	38	10.50%	Skateboarding	9.8	-3.60%
Weight Lifting	37.5	6.60%	In-Line Roller Skating	9.3	-13.10%
Aerobic Exercising	36.2	4.10%	Paintball Games	6.7	-9.90%
Running/Jogging	35.9	18.20%	Skiing (alpine)	6.5	1.90%
Billiards/Pool	31.7	7.40%	Hunting w/Bow & Arrow	6.2	7.50%
Basketball	29.7	5.70%	Snowboarding	5.9	15.60%
Boating, Motor/Power	27.8	-12.70%	Water Skiing	5.6	6.30%
Golf	25.6	2.60%	Target Shooting - Airgun	5	-24.80%
Target Shooting	20.3	-3.20%	Muzzleloading	3.4	-6.10%
Hunting with Firearms	18.8	-3.60%	Cheerleading	2.9	na
Yoga	16	17.10%	Hockey (ice)	1.9	-7.70%
Soccer	15.5	12.50%	Skiing (cross country)	1.6	-5.20%
Baseball	15.2	8.70%			



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**Table 5.
2008 Participation - Ranked by Total Participation**

<i>Sport</i>	<i>Percent Total Change</i>	<i>Sport</i>	<i>Percent Total Change</i>
*Total = participated more than once (in millions), age 7 years and up. Percent Change is from 2007			
Source: National Sporting Goods Association. National Sports Participation Survey, 2008.			

State and Regional Trends

While the national trends provide general indications of what types of activities could be supported at the USC site, ultimate demand will be driven by regional recreation trends. The most important source for understanding these is the New York State Office of Parks, Recreation and Historic Preservation's Statewide Comprehensive Outdoor Recreation Plan (SCORP). Table 2 provides a projection of statewide recreation trends to 2025 developed as part of SCORP. Note that five of the six most popular recreation activities in the State can be easily accommodated at the USC site. "Relaxing in a Park" and "Walking" are engaged in by over 10 million people statewide and are expected to remain the most popular recreational activities in the State through 2025. While the USC site does not lend itself to becoming an Historical Site or Museum (the third most popular activity, it could easily accommodate the next three popular activities: "Swimming" (7 million participants), Biking (5 million participants) and "Skating, Sledding and other Local Winter Activities" (4.9 million participants).

**Table 6.
Participation in Recreation al Activities in New York State, 2005 and 2025**

<i>Activity</i>	<i>2005 Participants</i>	<i>% pop 2005</i>	<i>2025 Participants</i>	<i>% pop 2025</i>	<i>Growth</i>	<i>% Growth</i>
Relaxing in Park	12,495,807	78.03%	12,994,075	77.79%	498,268	3.99%
Walking	10,259,380	64.06%	10,704,563	64.09%	445,183	4.34%
Historic Sites	9,279,275	57.94%	9,776,268	58.53%	496,993	5.36%
Swimming	7,193,165	44.92%	7,201,111	43.11%	7,946	0.11%
Biking	5,148,247	32.15%	5,304,582	31.76%	156,335	3.04%
Skating, Sledding and other Local Winter Activities	4,956,576	30.95%	4,954,269	29.66%	-2,307	-0.05%
Boating	4,296,624	26.83%	4,327,552	25.91%	30,928	0.72%
Camping	4,314,756	26.94%	4,261,150	25.51%	-53,606	-1.24%
Court Games	3,947,521	24.65%	3,943,761	23.61%	-3,760	-0.10%
Hiking	3,084,106	19.26%	3,080,203	18.44%	-3,903	-0.13%
Field Sports	3,015,000	18.83%	2,969,291	17.78%	-45,709	-1.52%
Fishing	2,917,010	18.22%	2,883,353	17.26%	-33,657	-1.15%
Golfing	2,031,215	12.68%	2,044,693	12.24%	13,478	0.66%



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Table 6.
Participation in Recreational Activities in New York State, 2005 and 2025

<i>Activity</i>	<i>2005 Participants</i>	<i>% pop 2005</i>	<i>2025 Participants</i>	<i>% pop 2025</i>	<i>Growth</i>	<i>% Growth</i>
Tennis	1,734,461	10.83%	1,751,914	10.49%	17,453	1.01%
Downhill Skiing	1,252,905	7.82%	1,223,477	7.32%	-29,428	-2.35%
X-Country Skiing	1,084,119	6.77%	1,105,715	6.62%	21,596	1.99%
Hunting	1,003,858	6.27%	1,027,296	6.15%	23,438	2.33%
ATV	1,029,832	6.43%	992,248	5.94%	-37,584	-3.65%
Snowmobiling	762,384	4.76%	722,935	4.33%	-39,449	-5.17%

Source: NYS Office of Parks, Recreation and Historic Preservation, Statewide Comprehensive Outdoor Recreation Plan, 2008, page 27.

Demand for Recreational Activities in Beacon and the Region

The SCORP data shows that there clearly is interest in the kinds of recreational activities that could be supported at the USC site. The next key question is whether those trends translate into regional or local demand for such facilities. Fortunately, the analysis included in SCORP allows us some insight into that question. SCORP provides an index of relative needs for various recreation facilities in each of the counties of New York State. As SCORP explains, the index shows relative need. For each facility type a county is assigned a value between 1 and 10. A value of 5 indicates that the county has a need for that type of facility that is equivalent to the overall need in New York State. A rating above “5” means that the need for that type of facility is particularly acute in that county. A rating below “5” indicates that the need is less acute. Note: a rating of “5” does not mean there is no need for the facility; it means that the need is the equivalent of the statewide need which, in almost every category, is still significant according to SCORP.

Table 3 shows SCORP’s relative index of recreational needs for Dutchess Putnam and Westchester counties. These were chosen as the three counties from which the USC site is most likely to draw visitors. Thus, the table provides an overview of regional demand for recreational uses. It clearly identifies multiple opportunities for the USC site to serve unmet needs of residents of the three counties.

Table 7. Relative Index of Recreation Needs by County			
<i>Index of Needs</i>	<i>Dutchess</i>	<i>Putnam</i>	<i>Westchester</i>
Biking	6	6	9
Boating	6	5	6
Camping	6	6	8



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Court Games	5	4	5
Cross-country Skiing	7	7	10
Downhill Skiing	6	6	8
Equine	6	6	10
Field Games	5	6	5
Fishing	6	5	7
Golf	5	5	6
Hiking	7	7	10
Historic Sites	5	5	8
Parks/ Picnicking	4	5	7
Skating, Sledding & Other Winter Activities	4	7	6
Snow Mobiling	6	5	7
Swimming	5	5	7
Tennis	4	5	10
Walking	5	5	8
Source: NYS Office of Parks, Recreation and Historic Preservation, Statewide Comprehensive Outdoor Recreation Plan, 2008, pages 44-45.			

In terms of needs within Dutchess County, there are only two uses that could be accommodated at the USC site that were rated below a “5”: picnicking and such winter uses as skating and sledding. For all other uses potentially supported at the site (e.g., biking, camping, cross-country skiing, hiking, swimming and walking) Dutchess County has a rating of “5” or higher. Note also that for these same uses, Putnam and Westchester counties have no scores below five. Indeed, Westchester County has scores of “10” for cross-country skiing and hiking, two uses that could be easily accommodated at the USC site.

Thanks to the community survey completed for Beacon’s 2007 comprehensive plan, we can even identify how some of these trends are felt within the City itself. When discussing recreation issues identified by the community survey, the plan makes the following points:

Parks and recreation was the second most important issue among those relating to recreation and community facilities. 94 percent of respondents view this as either ‘important’ or ‘somewhat important,’ and 91 percent felt that new parks and/or open space was important to some degree. The survey asked about potential new outdoor recreational facilities versus new indoor, year-round facilities, and both were seen as important, with outdoor facilities gathering 86 percent of an affirmative response versus 79 percent for indoor facilities. Potential new pedestrian access to the Fishkill Creek, Hudson River, Mt. Beacon and/or other open space also received high marks, with 86 percent judging this as important to some degree. The survey asked



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respondents to suggest recreational facilities, if any were needed. Common themes to this answer was a request for more or improved parks, a swimming pool, a youth center, a senior center, bike paths, and a marina/waterfront facilities. . . .

There were two additional land uses related to community facilities, 'community gardening plots' and 'farmers market and/or agricultural outlets,' which residents were asked to either encourage or discourage. 'Community gardening plots' were favored 51 percent in favor versus 36 percent opposed, and 'farmers market and/or agricultural outlets' were favored more strongly, with 56 percent wishing to encourage this type of activity, versus 37 percent opposed.

Frederick P. Clark Associates, *City of Beacon Comprehensive Plan, 2007*, pp. 86-87.

An analysis of regional and local trends related to consumer spending on recreation reinforce the concept that the USC site could meet substantial demand for recreation both locally and regionally. ESRI Business Analyst is a commercial database that, among other things, prepares estimates of consumer spending patterns to support market analyses and feasibility analyses. They have compiled a "Spending Potential Index (SPI)" which compares local spending patterns with national averages. For each category of goods and services, an area is given a score of 100 if the share of local spending in that category is equal to the share of national spending on that same good or service. Thus, if a local area has an SPI of 100 for auto parts, its consumers are as likely to purchase auto parts as the national average. If a local area has an SPI of 120 for auto parts, its consumers are 20 percent more likely to purchase auto parts than consumers in the nation as a whole. Table 4 provides the "Spending Potential Index for selected recreational goods and services for five different geographic areas: the City of Beacon, Dutchess County, the Tri-County region of Dutchess, Putnam and Westchester counties as well as the geographic areas that are within 30-minute and 60-minute drives of the USC site. (A map showing the geographic extent of these drive times is included in the appendices.

Table 4 includes Spending Potential Indices for the following recreation categories:

- Admission to Movies, Theater, Opera, Ballet
- Fees for Participant Sports (excluding cost of trips)
- Fees for Recreational Lessons
- Membership Fees for Social/Recreational/Civic Clubs
- Rental/Repair of Recreation/Exercise Equipment

Note that in every category, City of Beacon residents are more likely to spend money on these items than the national average. This suggests that city residents are more interested in such activities than



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consumers nationwide. Note also that this holds true for every geographic area in Table 5. Indeed consumers in Dutchess County and the three county area are even more likely to spend on these items than Beacon residents. The ERSI data also enable us to look at the preferences of consumers within a 30-minute drive. The data in Table 4 tell us that, within 30 minutes of the site there are 407,146 people and 142,108 households with a median household income of \$68,634. It also indicates that the households within 30 minutes of the site are 20 to 40 percent more likely to spend on these recreation-related items than consumers nationwide. This yet another clear indication that there is substantial demand for recreation activities locally and regionally that can be served by the USC site.



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Table 8.
Estimates of Consumer Spending Patterns on Selected Recreational Goods & Services, 2009.

<i>Demographic Estimates</i>	<i>Beacon</i>	<i>Dutchess Co.</i>		<i>Dutchess/Putnam/Westchester Area</i>		<i>30-Minute Drive Time</i>	<i>60-Minute Drive Time</i>			
	2009	2009	2009	2009	2009	2009	2009	2009		
Population	15,185	298,349	1,355,816	407,146	2,568,913					
Households	5,212	106,176	485,037	142,108	897,007					
Families	3,374	72,678	335,525	99,258	646,771					
Median Age	36.8	38.3	39.4	36.3	39.5					
Median Household Income	\$62,916	\$70,327	\$81,207	\$68,634	\$83,522					
<i>Selected Recreation Spending</i>	<i>Spending Potential Index*</i>	<i>Average Amount Spent</i>	<i>Spending Potential Index*</i>	<i>Average Amount Spent</i>	<i>Spending Potential Index*</i>	<i>Average Amount Spent</i>	<i>Spending Potential Index*</i>	<i>Average Amount Spent</i>	<i>Spending Potential Index*</i>	<i>Average Amount Spent</i>
Admission to Movies, Theater, Opera, Ballet	109	\$165.03	127	\$191.88	175	\$264.96	125	\$190.09	170	\$257.14
Fees for Participant Sports, excl. Trips	105	\$116.48	127	\$141.14	170	\$188.57	124	\$136.87	171	\$189.66
Fees for Recreational Lessons	117	\$152.54	140	\$182.67	203	\$265.18	138	\$180.00	198	\$258.64
Membership Fees for Social/Recreation/Civic Clubs	106	\$180.71	129	\$219.81	179	\$305.92	125	\$213.28	177	\$302.45
Camp Fees	118	\$49.26	145	\$60.32	209	\$87.31	142	\$59.44	207	\$86.56
Rental/Repair of Sports/Recreation/Exercise Equipment	108	\$4.33	125	\$5.02	172	\$6.86	122	\$4.87	170	\$6.81
*The Spending Potential Index (SPI) is household-based, and represents the amount spent for a product or service relative to a national average of 100. Detail may not sum to totals due to rounding.										
Source: ESRI forecasts for 2009; Consumer Spending data are derived from the 2005 and 2006 Consumer Expenditure Surveys, Bureau of Labor Statistics										



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Conclusions

Our review of national, state, regional and local trends all suggest that the USC site has the potential to serve the needs of residents in Beacon and the larger region. Further, we constructed this analysis to focus only on those types of recreation that did not require substantial capital investments above what currently exists on the site. Note also that this is a very conservative estimate of potential demand. For the most part, it focused on the three county region. Yet, given its presence on the MetroNorth Line, Beacon regularly draws visitors from New York City for cultural and recreational activities. Yet we did not include New York City in our analysis. And, under SCORP's relative need index, the five boroughs tend to have indices approaching 10 for virtually all of the uses we examined in Table 4. Thus, regional and local trends in recreational activity and spending strongly suggest that the USC site will be capable of attracting substantial visitation.

Task 5. Financial & Physical Feasibility

Through the Master Plan the City of Beacon hopes to clarify several aspects of its future operation of the University Settlement Camp property. Clearly, the property is an incredible asset, with its proximity to both the downtown business district and the abundant outdoor recreation opportunities of the Hudson Highlands State Park. However, City residents have questioned the City's decision to enter into an agreement with NYS Parks to operate the site, citing concerns that the site will be a drain on the City's resources.

These concerns are the justification for the detailed financial analysis that Fairweather Consulting has performed as part of the Master Plan. A key assumption was that the Master Plan should provide an approach to programming on the site that avoids an annual operating deficit, since such a deficit would compel the City to divert resources from its General Fund to the site. At the same time, we assumed that the current level of support from the City, in terms of resources already budgeted toward the site itself (for fuel, cleaning supplies, electric/other utilities, and basic maintenance) and toward the swimming pool at the site, will continue. As the analysis shows, it is possible that under some programming configurations, the site may be able to generate a modest operating surplus, which, if achieved, we strongly recommend be directed toward additional marketing and publicity for the site. This can be expected to show positive returns later due to increases in site visitation, entrance fees, and rental fees. However, another option would be for the City to reduce its current level of financial support to the site, freeing those resources up for other needs.



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Programming Constraints

A central area of focus of this report is an assessment of the financial and physical feasibility of the uses that have been proposed by stakeholders and the general public. The first step in assessing the general feasibility of proposed uses is to consider a variety of constraints to determine whether they strictly preclude an option from being pursued. Such hard constraints help to remove certain options from consideration, and allow us to focus increased attention on the potential uses that remain.

**Table 9.
Hard Constraints on Site Programming Options**

1. Programs/uses must comply with the City's agreement with NYS Parks, Recreation and Historic Preservation.
 - a. Property use must be for "recreation, education, and conservation purposes or for other park uses as may be agreed to by the parties..."
 - b. Property must be maintained "in a safe condition..."
 - c. "Actions involving the use, change of use, development, improvement or physical alteration...shall require prior written approval of Parks..."
 - d. "Property shall be open and available to the general public on an equal basis and in no event shall access be limited to residents of the City or other designated local government."
 - e. The fee structure adopted by the City, and approved by Parks, "shall not discriminate in favor of City residents but shall apply to all New York State residents equally."
2. Programs/uses must comply with tenant agreements that the City has/will establish with third-party organizations.

Source: NYS Office of Parks, Recreation and Historic Preservation, Statewide Comprehensive Outdoor Recreation Plan, 2008, pages 44-45.

These constraints have several important implications for the final programming on the site. First, we have not included in our analysis any proposed uses that would limit access to the site to City residents only, or to residents of any other local government. We have also avoided programming options that close access to the entire site for private functions or rentals. Second, when it comes to assessing the financial viability of uses, we have used a single-tier fee structure, which sets common fees for all visitors and renters.

Physical constraints of the site are a concern, but they have not been used to rule out potential site uses. As outlined in Task 1, there are several site and building improvements that must be implemented if certain programs are implemented. While these physical constraints may be costly to mitigate, they would, if addressed, increase the potential for the site to generate new revenues through rentals and fees. As such, rather than eliminate uses that require solutions to these



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constraints, we have attempted to assign costs to the improvements. By doing so, we can show how much revenue would be needed in order to offset the costs of making these improvements.

Since site and building improvement costs are fixed, the more uses implemented on the site or within a given building the lower the portion of capital costs that that use must offset in order to be financially viable. The proportion of overall capital costs assigned to a given use, which varies depending on the number of uses contributing to that capital cost, is the pro-rata capital cost of that use.

Fee Research

Our financial analysis of proposed uses involves several fee-based sources of revenue. In order accurately to estimate the potential revenues that could be generated by the uses on the site it is necessary to determine what fees are reasonable to charge for such uses. We researched a number of parks in the Hudson Valley to identify what fees, if any, those parks charge for similar activities as a way to develop reliable, market-based estimates that could be used to assess the viability of various programming options. The parks identified and investigated are listed below.

**Table 10.
Parks Included in Fee Research**

<i>Park Name</i>	<i>City</i>	<i>County</i>	<i>Size</i>
Bowdoin Park	Wappingers Falls	Dutchess	301 acres
Wilcox Park	Stanfordville	Dutchess	615 acres
Quiet Cove Riverfront Park	Poughkeepsie	Dutchess	27 acres
Harlem Valley Rail Trail	Various	Dutchess	11 mile trail
Dutchess Stadium	Wappingers Falls	Dutchess	21 acres
Dutchess Rail Trail	Various	Dutchess	11 mile trail
Algonquin Park	Newburgh	Orange	41 acres
Chadwick Lake Park	Newburgh	Orange	445 acres
Cronomer Hill Park	Newburgh	Orange	
D&H Canal Park	Cuddebackville	Orange	249 acres
Heritage Trail	Various	Orange	11.5 mile trail
Kowawese Unique Area at Plum Point	New Windsor	Orange	102 acres
Thomas Bull Memorial Park	Montgomery	Orange	719 acres
Warwick County Park	Warwick	Orange	705 acres
Winding Hills Park	Montgomery	Orange	509 acres
Blue Mountain	Peekskill	Westchester	1500 acres
Bronx River Parkway	Various	Westchester	807 acres (linear)



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**Table 10.
Parks Included in Fee Research**

<i>Park Name</i>	<i>City</i>	<i>County</i>	<i>Size</i>
Croton Gorge Park	Cortlandt	Westchester	97 acres
Croton Point Park	Croton-on-Hudson	Westchester	508 acres
George's Island Park	Montrose	Westchester	208 acres
Glen Island Park	New Rochelle	Westchester	105 acres
Kensico Dam Plaza	Valhalla	Westchester	98 acres
Mountain Lakes Park	North Salem	Westchester	1082 acres
Ridge Road Park	Hartsdale	Westchester	170 acres
Saxon Woods Park	White Plains	Westchester	700 acres
Sprain Ridge Park	Yonkers	Westchester	278 acres
Tibbets Brook Park	Yonkers	Westchester	161 acres
V. Everit Macy Park	Irvington	Westchester	172 acres
Wampus Pond	Armonk	Westchester	
Willson's Woods Park	Mt. Vernon	Westchester	23 acres
Ward Pound Ridge Reservation	Cross River	Westchester	4315 acres
Lasdon Park, Arboretum & Veterans Memorial	Somers	Westchester	234 acres
Delano-Nitch Recreation Park	Newburgh	Orange	26 acres
Delano-Nitch Recreation Park/ Aquatic Center	Newburgh	Orange	
Delano-Nitch Recreation Park/ Stadium	Newburgh	Orange	
Lake Washington/Masterson Park	Newburgh	Orange	
Harris Hill Park	Elmira	Chemung	400 acres
Park Station	Elmira	Chemung	
Saratoga Spa State Park	Saratoga	Saratoga	2200 acres
Bear Mountain State Park		Orange	5067 acres
Belleayre Mountain State Park		Ulster	
Mohonk Preserve		Ulster	
Source: Fairweather Consulting			

These parks vary from unimproved forest land to highly-developed stadiums and recreation facilities. However, many of these parks used entrance fees (or parking fees), rental fees and activity fees to offset operating and maintenance costs of the park. Rental fees have already been established for the facilities at the University Settlement Camp, and for the most part our research into the fees charged at similar facilities supports the rates charged by the City of Beacon. Entrance fees, on the other hand, are not currently charged for access to the University Settlement Camp property.



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Financial Analysis Assumptions

Our financial analysis is based on a variety of assumptions that, if violated, could change the actual outcome of the recommended programming configuration. These assumptions represent our best professional opinion of the facts, but cannot be entirely determined in advance. As such, we have also reviewed these assumptions with City representatives to incorporate their feedback and input. Finally, as presented in the following sections, we have tested our financial analysis to determine the effects of violations in our assumptions. Wherever a modest deviation from our assumed values results in a significant variation in the financial model's outputs, we have indicated this in the final recommendations or financial projections.

Entrance Fees

As noted above, many parks in the Hudson Valley region raise revenue through an entrance fee or parking fee. The City of Beacon does not currently charge an entrance fee to the USC site, but does charge fees ranging from \$5 to \$8 (adults) or \$3 to \$5 (children) for access to the pool. Current site access is limited to the pool area, so this fee serves essentially the same purpose as an entrance fee. Once certain site improvements are made to prevent a hazard to visitors, we recommend that the entire site be opened for public use with a modest \$5 entrance fee. This fee would replace the swimming pool fee, so residents who pay to enter the site would be able to participate in a range of activities, including hiking, running, picnicking, birdwatching, and swimming without additional cost.

Our financial model uses the information presented in the section above on local and regional recreation trends, combined with our park research, to develop an estimate of the number of entrance fees paid annually. The estimate is predicated on two assumptions: first, that overall site visitation will increase over time, particularly as new activities and uses are implemented on the property; and second, that entrance fees will not be paid by rental patrons and will be charged only on weekends and holidays during the months of October – April. Given these assumptions, the table below describes our estimates for site visitation and the revenues that we expect will be generated through entrance fees.



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Table 11. Site Visitation and Entrance Fees	
<i>Assumption</i>	<i>Value</i>
Initial Entrance Fee	\$5 per person
Initial Visitation	5,203
Revenue from Entrance Fees	\$26,013
Source: Fairweather Consulting	

Note that given budget figures from the City’s 2009 budget, approximately \$7,500 was generated through pool admission fees. Given an average pool admission of \$5, the current annual visitation to the site is over 1,500. Our estimate of 5,200 visitors is somewhat higher, but we feel that it is a reasonable estimate of the site’s visitation once uses are expanded to include a number of activities that are in high demand within the immediate area and the surrounding areas in Putnam, Orange, and Westchester Counties, such as hiking, walking, cross-country skiing, and picnicking.

Debt Financing

Given the significant capital improvements required on the University Settlement Camp property, both to the site as a whole and to the site buildings and facilities, we have assumed that implementation of any capital projects will be financed through long-term debt. Debt financing of capital projects spreads the cost of improvements out over a multi-year period, which greatly reduces the up-front costs of such improvements. However, the use of debt financing increases the total cost of improvements since annual payments include interest above and beyond principle costs. Our assumed debt terms are indicated in the table below.

Table 12. Terms of Debt Financing	
<i>Assumption</i>	<i>Value</i>
Debt Period (Years)	15
Annual Interest Rate	8%
Principle	Varies depending on which improvements are implemented.
Source: Fairweather Consulting	

Operating Schedule

The operating schedule of the University Settlement Camp property is the basis for determining the amount of activity that the site is capable of supporting for various uses. For daily rentals, the total revenue depends on how many days facilities are available to be rented. For activities, the total



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revenue depends on how frequently those activities are provided. The following table describes our assumptions related to the operating schedule of the site and its programs.

Table 13. Site Operating Schedule	
<i>Assumption</i>	<i>Value</i>
Primary Operating Season*	May 1 through September 30
Primary Operating Hours**	10:00 AM – 6:00 PM
Number of Months in Operation	5
Number of Days in Operation	152
Number of Hours in Operation	728
Source: Fairweather Consulting	
* Entrance fees charged daily during primary operating season, weekends only during off-season.	
** Primary operating hours are used for hourly activities such as the pool and classes, and run during the summer only (June 1 – August 31)	

For several uses, program specific operating hours determine the availability of the program and the potential revenue and expenses generated by the program. These operating schedules are listed in the discussion of program revenues and expenses found in Appendix C.

Rental Fees

As mentioned previously, our research into fees charged at other parks suggests that, for the most part, the City of Beacon has established reasonable rental fees for the facilities at the University Settlement Camp. To date, the City has no doubt found it difficult to maintain these rental rates in some cases, given the condition of some of the buildings on the site. We believe that once the recommended building and site improvements are implemented, the City is likely to see increased demand for these facilities at the current rates.

While the City’s rates are comparable to other similar facilities, we have noted that the City’s rate schedule provides a reduced rental rate for non-profit organizations and for City residents. Given the City’s current agreement with NYS Parks, these split rates should be phased out in favor of a single, universal rental rate for each of the facilities. For the purposes of our analysis, we have taken a simple average of the current resident and non-resident rates to be a good estimate of the future rental rate for facilities. The table below lists our assumptions regarding the rental rate for the buildings on the site.



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**Table 14.
Rental Fee Schedule**

<i>Site Facility/Area</i>	<i>Rental Rates</i>			
	<i>Hourly</i>	<i>Daily</i>	<i>Monthly*</i>	<i>Seasonal*</i>
Art Studio	N/A	\$68	\$506	\$2,565
Main Bungalow Area	N/A	\$30	\$225	\$1,140
Gym	\$18	\$140	\$1,050	\$5,320
Infirmery	N/A	\$175	\$1,313	\$6,650
Library	N/A	N/A	N/A	N/A
Lodge	N/A	\$300	\$2,250	\$11,400
Nature Center	N/A	N/A	N/A	N/A
Pavillion	\$45	\$275	\$2,063	\$10,450
Pool Area	\$93	\$740	\$5,550	\$28,120
Stover Theatre	\$138	\$313	\$2,344	\$11,875
USC Main Kitchen	\$138	\$175	\$1,313	\$6,650
Woodshop/Office Area	N/A	\$68	\$506	\$2,565
USC Main Dining Room	\$45	\$275	\$2,063	\$10,450
Bath Bungalows	N/A	\$50	\$375	\$1,900
Whitehouse Main Building	N/A	N/A	N/A	N/A
Adventure Course	\$100	\$800	\$6,000	\$30,400
Outdoor Education Center	N/A	\$100	\$750	\$3,800
Source: Fairweather Consulting				
* Monthly and seasonal rentals are calculated at 75% off of the daily rate.				

As the table indicates, we have calculated monthly and seasonal rental rates at a 75% discount from the daily rate. This arrangement is in keeping with a recent City ordinance regarding multi-use fees for the USC site. However, we believe that a 75% discount may be excessive and we encourage the City Council to reconsider this level of discount, particularly as rental occupancy rates increase over time.

Activity Fees and Other Fees

In addition to these rental rates, we feel that the City’s added charges for water or electrical utilities, as well as for site-wide special events are reasonable and should be continued in most instances.

Activity fees are charges for special activities offered on the USC site, either by the City of Beacon or by a partner organization (such as the BCC). Activity fees used in our calculations vary based on the type of activity, but are generally in the range of \$25 to \$30 per hour for classes (such as Dancing, Art Classes, Woodworking Classes, Gymnastics Classes, and Cooking Classes). Festivals and small



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concerts on the lawn are other uses that generate revenue through activity fees. For these activities, we have assumed a flat fee of \$1,000 per event, which is used to offset additional site maintenance and clean-up costs. Finally, the proposed Community Garden would generate seasonal fees of \$100 per plot.

Rental Occupancy

Perhaps the most indefinite factor in our analysis involves the frequency of rentals of the site's facilities. As the City has already discovered, rentals are often hard to predict and can fluctuate greatly during the season and between years. This challenge is most difficult in the early stages of development of a park, since public awareness of the facilities is low. As time progresses and awareness increases, rental occupancy rates are likely to rise and become more predictable.

For the purposes of our analysis, we have estimated rental occupancies based on the following assumptions: first, that those buildings that are already in the best condition and which are best known on the site are likely to have significantly higher occupancy; and second, that given the uncertainty regarding occupancy rates, our financial model should err on the side of caution by underestimating, rather than overestimating, rental demand. With this in mind, the following table describes the rental occupancy rates for various site facilities assumed in our calculations. Each use has a defined typical rental period: hours, days, months, or the whole season. The rental occupancy rate represents the percentage of available periods (i.e. hours, days, months, seasons) that the facility is occupied for that use. The final column shows the actual periods that we assume each use will actively occupy the facilities.

**Table 15.
Occupancy Estimates for Rental Uses**

<i>Use Name</i>	<i>Description</i>	<i>Site Area</i>	<i>Typical Rental Period</i>	<i>Occupancy Rate</i>	<i>Periods Occupied</i>
Art studio space	Stand alone day camp or added feature of other group rental	Art Studio	Daily	5.0%	7.6
Art studio	Local 'artist in residence'	Art Studio	Seasonal	100.0%	1
Other rental opportunities		Infirmary	Daily	2.0%	3.04
Overnight Camps	Like Michigan Tech rental from 08	Infirmary	Daily	18.0%	27.36
Private events at the Lodge	Corporate or other events	Lodge	Daily	5.0%	7.6



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**Table 15.
 Occupancy Estimates for Rental Uses**

<i>Use Name</i>	<i>Description</i>	<i>Site Area</i>	<i>Typical Rental Period</i>	<i>Occupancy Rate</i>	<i>Periods Occupied</i>
Community Gardens	Plot size = 20x20. 60 plots is 24,000 sq ft or approx. 1/2 acre	Open Space	Seasonal	50.0%	0.5
Movies in the Park	Free movies to attract attention and increase site visitation	Open Space	No Rental Fee	0	
Private events at the Pavillion		Pavillion	Daily	7.0%	10.64
Private pool rental	40% of total hours (June - Aug) available for private rental to orgs or camps	Pool Area	Hourly	23.9%	291.2
Swim lessons	Classes offered by City or the BCC, 10% of total hours, paid at hourly rental rate.	Pool Area	Hourly	6.0%	72.8
Private events at the Theater	Rental not associated with camp	Stover Theatre	Daily	40.0%	60.8
Private events at the Amphitheater		Stover Theatre	Hourly	1.0%	12.16
Theater space	Stand alone day camp or added feature of other group rental	Stover Theatre	Daily	3.0%	4.56
Private events at the Bungalows	Corporate retreats and other private rentals	Bath Bungalows	Daily	10.0%	15.2
Boy/Girl Scouts or Other Overnight Camps	Camp rental	Bath Bungalows	Daily	10.0%	15.2
Clearwater headquarters		Whitehouse Main Building	Monthly	240.0% (>100% since occupancy is for four seasons)	12
Hikers Cabins	Rental cabins available for people interested in outdoor activities, primarily on Mt Beacon or in the Hudson Highlands State Park.	Main Bungalow Area	Daily	5.0%	7.6
Overnight Camps		Main Bungalow Area	Daily	10.0%	15.2
Kitchen space	Available as an additional space for rent by groups using other camp facilities	USC Main Kitchen	Daily	5.0%	7.6
Commercial Kitchen	Hourly rental for use as a commercial kitchen by local	USC Main Kitchen	Hourly	3.0%	36.48



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**Table 15.
 Occupancy Estimates for Rental Uses**

<i>Use Name</i>	<i>Description</i>	<i>Site Area</i>	<i>Typical Rental Period</i>	<i>Occupancy Rate</i>	<i>Periods Occupied</i>
	restaurants or food producers.				
Dining room space	Available as an additional space for rent by groups using other camp facilities	USC Main Dining Room	Daily	3.0%	4.56
Gym space	Stand alone day camp or added feature of other group rental	Gym	Daily	8.0%	12.16
Athletic Events	Space to host events of local or regional athletic groups	Gym	Hourly	5.0%	60.8
Adventure Course	Classes offered by City or the BCC, 15 students per class, one class per week for season	Adventure Course	No Rental Fee	10.0%	0
Woodshop Space	Available as an additional space for rent by groups using other camp facilities	Woodshop/Office Area	Daily	5.0%	7.6

Source: Fairweather Consulting

Over time, occupancy rates are estimated to increase at a rate of 10% per year for most uses. For uses where occupancy rates started higher than 10%, this increase is reduced to reflect a natural limit of how frequently any one facility on the site is likely to be rented.

Determining Financial Viability

Based on the constraints, assumptions and fee research described above, Fairweather Consulting has developed a financial model to determine the financial viability of various configurations of possible site uses, building improvements, and site improvements.

The financial viability of the University Settlement Camp is a function of several factors:



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Financial Viability:	Expenses	+	Revenues	> \$0
Site-wide	Administration, site improvement costs, general site maintenance, promotion, etc.		Grants, entrance fees, City budget contributions.	
Building-specific	Building improvement costs, building maintenance/repair, etc.		Grants or gifts, building rental fees.	
Use-specific	Program operation and promotion, utilities, custodial costs, etc.		Special fees, activity fees, concession fees.	

Overall, the financial viability of the site depends on whether revenues meet or exceed expenses. However, revenues and expenses come in several forms on a multi-use site like the University Settlement Camp property.

Some revenues and expenses are at the site-wide level, such as the implicit costs of administering the site, including budgeting, payroll, program oversight, planning, and potential revenues from grants to the site or from site-wide entrance fees. Financial viability also depends on a balance in terms of building-specific costs and revenues. On the cost side, expenses such as building improvements, maintenance, and repair are important factors. Revenues may come from building-specific grants or gifts, but are more likely to come from rental fees. The financial feasibility of any proposed use is also determined by balancing the cost and revenues associated with that use.

To simplify the analysis, we have developed pro-rata building and site costs, which allow us to focus our financial analysis on the potential configuration of uses on the site. The total cost of a use is a combination of a pro-rata site improvement cost and a pro-rata building improvement cost plus the actual cost of operating the use. Operating costs, too, may involve some shared expenses and some unique expenses. Examples of shared expenses are utilities, building maintenance and



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administration. Unique expenses are those that vary and are specific to a particular use. For example, lifeguards are a unique expense of the operation of the pool.

Determining revenues generated by potential uses also involves a series of steps. First, for each use we made an important assumption as to whether the use was one that would involve a rental fee, an activity fee, or an admission fee. As a general rule, we felt that most uses (e.g. walking, birdwatching, swimming, biking, etc.) should be available to all site visitors, as part of the entrance fee. This is in keeping with the City's agreement to operate the park as a recreation and conservation resource for the public.

However, certain uses require exclusive access to portions of the site for a limited period of time. Revenue estimates for these uses are based on a rental fee. In some instances, a proposed use required significant operating resources such as instructors, chefs, or housekeeping staff. For these uses, an additional activity fee (above the entrance fee) was used to offset the unique costs associated with the use. Finally, uses that involve outside vendors entering into a concession or franchise agreement to operate in the park will generate concession fees.

When all relevant expenses and revenues are included in the analysis, the end result, or the net fiscal impact of a specific site configuration, determines the financial viability of that configuration. If the uses to be implemented (along with the building and site improvements required by those uses) generate a positive net fiscal impact, then given the accuracy of the assumptions described above, the City of Beacon can expect that configuration of uses to be financially viable. If the net fiscal impact is negative, then the configuration is not financially viable and would, if the assumptions hold, result in an operating deficit at the site that would require additional City resources to support the site.

The "No Change" Scenario

Typically, the financial viability of each proposed site configuration should be compared to the status quo, or a "no change" option where the site continues to be used as it is currently, with no additional costs or revenues. However, in this case it would appear that the "no change" scenario is not a viable option. As described in the building and site inventory, three of the buildings on the site are not suitable for occupancy and could represent a hazard to site visitors. Many other buildings on the site are deteriorating at an increasing rate due to lack of needed repairs. Continued public access to the site, which is a condition of the City's contract with New York State Parks, will not be possible without a significant investment to upgrade and repair, or in some cases demolish, problematic structures.



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These factors suggest that the only alternative to an expansion of programming at the University Settlement Camp property is to dismantle buildings on the site as they become a hazard to visitors. According to our best estimates (as shown in Table 18 below), the initial cost of demolishing the hazardous buildings is \$26,250. Each year that the remaining structures go without repairs increases the likelihood that they too will require demolition. Without any corresponding increase in revenues from expanded site activity, the “no change” scenario does not appear to be financially viable, either in the short-term or the long-term.

Hypothetical “Big-Bang” Implementation

One option for the implementation of the suggested site programming is to begin immediately the recommended site and building improvements, and to begin operating all of the recommended uses as soon as possible. Based on the assumptions described above, we analyzed the financial viability of this option. See Appendix C for additional figures used to generate these estimates.

Costs for Big-Bang Implementation

The total estimated cost of building improvements on the site is \$733,000. The total estimated cost of site improvements is \$741,250. Assuming a 15-year term and an 8% annual interest rate, the annual debt service payments for these amounts are \$85,286 and \$86,600 respectively. Upon implementation of all suggested site uses, general administration of the site is projected to continue at the current cost of \$36,500, while site and building maintenance is expected to increase by \$27,500 and program-specific costs are expected to total \$37,726. This would bring the total cost of the site to \$273,611 annually.

Revenues for Big-Bang Implementation

Site revenues come from a variety of sources. Entrance fees are expected to be \$24,500, based on 4,900 annual visitors each paying \$5 in order to use the park facilities. Total fees from rentals are expected to be \$97,806, as detailed in Appendix C. Activity fees are expected to be \$15,971, and concession fees are estimated at \$1,500. In addition, current contributions from the City’s budget are expected to continue, providing an additional \$36,500 in revenues. Combined, the total revenues from the site are estimated at \$176,287.

Bottom Line for Big-Bang Implementation

While inaction presents financial challenges, so too would implementing all of the proposed uses at once. In such a “Big-Bang” implementation, all site and building improvements would be implemented



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immediately, in order to support the full range of proposed uses. Having implemented these new uses, maintenance costs would quickly increase, as would program-specific operating costs. While we expect that demand for the proposed uses will drive significant visitation to the site over time, it seems unlikely that visitation would be able to keep up with such a rapid increase in activity, meaning that revenues from entrance fees, rentals, and activities would be slow to increase.

Our analysis suggests that the “Big-Bang” implementation approach to site programming would create significant operating deficits for the City over the first several years of site operation. Using the cost and revenue estimates provided above, the hypothetical “Big- Bang” approach to site programming would result in a year 1 operating deficit of \$97,333. In the long-run, we expect that revenues would catch up with costs, but in the meantime the site would likely be a drain on the City’s resources.

Based on the fact that revenues from operations are likely to grow over time, as visitation and awareness of the site’s facilities grow, our recommended programming configuration takes place over a series of three phases, as described in the Master Plan section that follows.

Task 6. Master Plan & Physical Site Maintenance Plan

The Master Plan represents the culmination of the tasks described above. The building and site inventory developed by the Chazen Companies established the estimates necessary to calculate the cost of upgrading facilities in order to implement suggested uses that require those facilities. The public outreach and stakeholder engagement process gathered diverse input to identify the broadest possible range of uses for the site, and to determine the level of public and organizational support for those uses. The scan of regional and local recreation demand provided a basis for estimating site visitation and rental occupancies. Finally, the financial and physical feasibility assessment provided a model for calculating the costs of physical improvements and program operations that helped to identify site configurations that are sustainable.

Based on all of these factors, the sections that follow outline the key aspects of our recommended programming configuration for the University Settlement Camp property. This recommended configuration describes the uses that we believe are the best fit for the site, in terms of both financial/physical feasibility and community support. For each use, a set of necessary site and building improvements are indicated, linking the Master Plan to the Physical Site Maintenance Plan, which provides additional detail regarding these recommended improvements.



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Recommended Configuration

Based on our analysis of the financial and physical feasibility of a range of options, we feel that the best approach to operating and maintaining the University Settlement Camp property involves a phased implementation of new programming uses over a period of seven years. Unlike the “Big-Bang” approach, a phased implementation results in projected operating surpluses each year. By making incremental improvements in stages over the seven year period costs of the site build slowly, and revenues are able to keep up as visitation and rental occupancies increase at a comparable pace.

A detailed description of the uses, building repairs, and site improvements recommended by phase, along with the accompanying financial projections, is provided below.

Phase 1 (Fall 2010 – 2013)

In the initial phase, beginning in Fall 2010 and continuing for three years, several key changes to the site’s operations are implemented, including replacing the current pool admission fee with an overall site entrance fee of \$5 per person. Additional programming added during Phase 1 must be carefully selected to avoid physical constraints that are too costly to implement immediately, such as connecting site facilities to the municipal sewer system or adding permanent gravel roads. Furthermore, since the site is still relatively unfamiliar to City residents and largely unknown throughout the rest of the region, Phase 1 programming must focus on activities and uses that are likely to draw a number of visitors and renters that will support the site’s stepped-up operating and maintenance costs.

The following table lists the uses recommended for implementation during Phase 1.

Table 16. Phase 1 Uses		
<i>Use Name</i>	<i>Description</i>	<i>Site Area</i>
Art studio space	Stand alone day camp or added feature of other group rental	Art Studio
Art studio	Local 'artist in residence'	Art Studio
Other rental opportunities		Infirmary
Overnight Camps	Like Michigan Tech rental from 08	Infirmary
Private events at the Lodge	Corporate or other events	Lodge
Hiking base/ headquarters	Use the Nature Center as an interpretive center for local ecology of the Highlands and the Hudson	Outdoor Ed Ctr
Nature Center space	Stand alone day camp or added feature of other group rental	Outdoor Ed Ctr



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Table 16. Phase 1 Uses		
<i>Use Name</i>	<i>Description</i>	<i>Site Area</i>
Environmental Education	Free hands-on environmental education classes offered by City or the BCC, 15 students per week for 5 month period	Outdoor Ed Ctr
Community Gardens	Plot size = 20x20. 60 plots is 24,000 sq ft or approx. 1/2 acre	Open Space
Movies in the Park	Free movies to attract attention and increase site visitation	Open Space
Hiking, biking, skiing trails		Open Space
Picnic areas		Open Space
Festivals and concerts		Open Space
Sculpture Garden		Open Space
Private events at the Pavillion		Pavillion
Public swimming	Pool admission covered in site entrance fee. 50% of total hours (June - Aug) available for public swimming	Pool Area
Private pool rental	40% of total hours (June - Aug) available for private rental to orgs or camps	Pool Area
Swim lessons	Classes offered by City or the BCC, 10% of total hours, paid at hourly rental rate.	Pool Area
Food Concessions		Pool Area
Art Shows	Free event to attract visitors	Stover Theatre
Movies	Two movies per season	Stover Theatre
Private events at the Theater	Rental not associated with camp	Stover Theatre
Private events at the Amphitheater		Stover Theatre
Dance	Dances sponsored by the City or BCC	Stover Theatre
Theater space	Stand alone day camp or added feature of other group rental	Stover Theatre
Private events at the Bungalows	Corporate retreats and other private rentals	Bath Bungalows
Boy/Girl Scouts or Other Overnight Camps	Camp rental	Bath Bungalows
Clearwater headquarters		Whitehouse Main Building
Source: Fairweather Consulting		

Overall, we expect that the site will generate annual revenues of \$24,483 from entrance fees. This assumes annual paid visitation will be 4,897 during Phase 1. In addition, we expect the site to generate \$73,931 from rental fees and \$8,250 from activity fees each year during Phase 1. The detailed list of uses by Phase, which is provided in Appendix C, describes the revenue from rental



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fees and activity fees for each use, including the occupancy rate and base fee amount. We also expect that concession operations on the site will generate an additional \$1,500 annually during the first phase of implementation. Finally, continuing its current level of funding, we expect that the City will set aside \$36,500 of its annual budget to cover general site administration and maintenance.

Given the uses implemented in Phase 1, the buildings those uses occur in, and the cost of improving those buildings, we expect that the total cost of building improvements in Phase 1 will be approximately \$187,250.

Table 17. Phase 1 Building Improvements	
<i>Building/Area</i>	<i>Estimated Cost</i>
Art Studio	(\$25,000)
Infirmery	(\$37,500)
Lodge	(\$9,000)
Nature Center	\$0
Open Space	\$0
Pavillion	(\$22,500)
Pool Area	(\$13,250)
Stover Theatre	(\$25,000)
Bath Bungalows	(\$37,500)
Whitehouse Main Building	\$0
Outdoor Education Center	(\$17,500)
Source: The Chazen Companies	

Since we assume that the City will borrow funds to pay for these capital improvements, the annual cost (principle plus interest) of these improvements is estimated at \$21,876. Likewise, we assume the City will borrow funds to pay for site-wide capital improvements, which in Phase 1 include clearing brush and trees on the site, demolishing unsafe buildings, and construction of parking lots and temporary roads to access the main bungalow area of the site. The expected annual cost of these capital projects (principle plus interest) is \$14,458.

Table 18. Phase 1 Site Improvements		
<i>Improvement</i>	<i>Description</i>	<i>Estimated Cost</i>
Parking	New parking lot to accommodate additional site traffic	(\$22,500)



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Table 18. Phase 1 Site Improvements		
<i>Improvement</i>	<i>Description</i>	<i>Estimated Cost</i>
Clearing	Cost of clearing brush and trees to prevent additional damage to buildings and improve safety of the site	(\$27,500)
Temporary Roads	Temporary road access to rear portion of the site to access bungalows and nature center	(\$47,500)
Demolition	Demolition of unsafe buildings	(\$26,250)
Source: The Chazen Companies		

We also expect additional shared operating and maintenance costs totaling \$12,000 during Phase 1, plus unique operating costs totaling \$13,096. These new costs cover increases in maintenance due to increased use of the site, hourly wages for staff to collect entrance fees, as well as special operating costs associated with any of the new uses.

During Phase 1, we recommend that the City continue to support the overall maintenance and operation of the site by continuing its current budget of \$36,500 for the site. This amount is a combination of \$9,000 (net of expenses less revenues) from the Settlement Camp Property budget (A7112) and \$27,500 (net of expenses less revenues) from the Swimming Pool Facility budget (A7141). As Table 19 shows we expect the site to generate an operating surplus of nearly \$47,000 each year during Phase 1. To support the increases in site visitation and rental occupancies that will drive continued surpluses in subsequent phases, we recommend that this surplus be dedicated to marketing and publicity for the site. However, another option would be to reduce or eliminate the City's current budget for the site and the swimming pool, which would lower the expected Phase 1 annual surplus to just over \$10,000.

Under the current arrangement, the site Caretaker receives use of the Caretaker's House on the site in return for monitoring the site and providing general site upkeep and maintenance. This appears to be a valuable arrangement for the City, and we recommend that this arrangement should continue. However, the City should consider modifying its contract with the Caretaker to require weekly reports of maintenance activities performed, so that in the future it can make an assessment of whether the value of the Caretaker's labor exceeds the potential income that could be generated by renting out the Caretaker's quarters.



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According to these estimates, the University Settlement Camp could generate a modest operating surplus during Phase 1 of \$46,734 per year. The following table shows the balance of all costs and revenues for Phase 1.

Table 19. Phase 1 Financial Viability										
<i>Expenses</i>					<i>Revenues</i>					<i>Surplus / (Deficit)</i>
<i>Site Imprv</i>	<i>Site Ops</i>	<i>Bldg Imprv</i>	<i>Bldg Maint</i>	<i>Prgm Ops</i>	<i>Entrance Fees</i>	<i>Rentals</i>	<i>Activities</i>	<i>Concessions</i>	<i>City Budget</i>	
(\$14,458)	(\$36,500)	(\$21,876)	(\$12,000)	(\$13,096)	\$24,483	\$73,931	\$8,250	\$1,500	\$36,500	\$46,734

Source: Fairweather Consulting

Phase 2 (2014 – 2015)

In Phase 2, we recommend an expansion of programming options offered on the site, which, when coupled with an expected increase in the activity related to Phase 1 uses, will drive an increase in the revenues generated by the site.

Table 20. Phase 2 Uses		
<i>Use Name</i>	<i>Description</i>	<i>Site Area</i>
Hikers Cabins	Rental cabins available for people interested in outdoor activities, primarily on Mt Beacon or in the Hudson Highlands State Park.	Main Bungalow Area
Overnight Camps		Main Bungalow Area
Local history center	Use the library as an interpretive center for local history of the Beacon/Hudson Highlands region.	Library
Environmental Education	Free classes offered by City or the BCC, 10 students per week for entire season	Library
Kitchen space	Available as an additional space for rent by groups using other camp facilities	USC Main Kitchen
Commercial Kitchen	Hourly rental for use as a commercial kitchen by local restaurants or food producers.	USC Main Kitchen
Dining room space	Available as an additional space for rent by groups using other camp facilities	USC Main Dining Room

Source: Fairweather Consulting

With the expanded use of the site comes a need for additional improvements, both to the site as a whole, and to buildings left unimproved during Phase 1. By the end of Phase 2, the needed improvements will be implemented for all buildings except for the Gym and the Woodshop area.



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Table 21. Phase 2 Building Improvements	
<i>Building/Area</i>	<i>Estimated Cost</i>
Main Bungalow Area	(\$270,000)
Library	(\$15,000)
USC Main Kitchen	(\$87,500)
USC Main Dining Room	(\$20,000)
Source: The Chazen Companies	

Additional site improvements implemented during Phase 2 include construction of permanent roads throughout the site, permanent signage, and connection to the City’s sewer system.

Table 22. Phase 2 Site Improvements		
<i>Improvement</i>	<i>Description</i>	<i>Estimated Cost</i>
Permanent Roads	Permanent gravel roads throughout site	(\$110,000)
Drainage	General improvement of drainage throughout the site	(\$125,000)
Signage	Improved signage throughout the site	(\$7,500)
Source: The Chazen Companies		

With several seasons in operation, the University Settlement Camp property will be in a better position by Phase 2 to tap into the recreation demand beyond the City of Beacon and southern Dutchess County. As a result, we expect visitation to the site to increase to about 9,750 paid visits per year at a rate of \$5.50 each, driving revenues from entrance fees to \$53,601. With several additional buildings repaired and available for rental, revenues from rentals will also increase, reaching \$110,931 in Phase 2. Responding to increased visitation and awareness, as well as additional facilities at the site, revenues from activities and from concessions will increase also, to \$14,256 and \$2,985 respectively. See Appendix C for a detailed listing of occupancy rates and base fees for rentals and activities during Phase 2.

The City’s current level of support is assumed to continue, as well, adding \$36,500 to the site’s revenues. In Phase 2, financial support from the City’s general budget is critical, since without it the expected surplus of \$27,827 (see Table 23) becomes a slight operating deficit of about \$9,000. In



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order to avoid an annual operating deficit in Phase 2, the City will be required to contribute at least \$9,000 per year to the site, which nonetheless would represent only 25% of its current annual support.

Given the uses implemented in Phase 2, the buildings those uses occur in, and the cost of improving those buildings, we expect that the total cost of building improvements in Phase 2 will be approximately \$392,500, which (when combined with Phase 1 improvements) translates to an annual cost (principle plus interest) of \$67,732. The expected annual cost of site improvements (principle plus interest) is \$42,789. We also expect site administration and maintenance costs of \$36,500, plus additional shared operating and maintenance costs totaling \$23,060 during Phase 2, plus unique operating costs totaling \$20,366.

According to our estimates, the University Settlement Camp could generate a modest operating surplus during Phase 2 of \$27,827 per year. The following table shows the balance of all costs and revenues for Phase 2.

Table 23. Phase 2 Financial Viability										
<i>Expenses</i>					<i>Revenues</i>					<i>Surplus / (Deficit)</i>
<i>Site Imprv</i>	<i>Site Ops</i>	<i>Bldg Imprv</i>	<i>Bldg Maint</i>	<i>Prgm Ops</i>	<i>Entrance Fees</i>	<i>Rentals</i>	<i>Activities</i>	<i>Concessions</i>	<i>City Budget</i>	
(\$42,789)	(\$36,500)	(\$67,732)	(\$23,060)	(\$20,366)	\$53,601	\$110,931	\$14,256	\$2,985	\$36,500	\$27,827
Source: Fairweather Consulting										

Phase 3 (2016 – 2017)

By Phase 3, nearly all of the programming options identified during our stakeholder and public outreach meetings have been implemented, and the completion of renovations to the Gym allow several new athletic activities on the site. During the public meetings, several suggested uses involved commercial uses in the USC Main Kitchen, such as professional catering rentals and onsite food production operations. We believe that it will be difficult to implement these uses in the short-term, but if visitation projections hold true, the foot traffic at the site could support creative uses such as these, which we have included in Phase 3. Also, as suggested by participants in the public meetings, Phase 3 includes replacement of the Adventure Course that was previously sited in the Southern portion of the site.



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Table 24. Phase 3 Uses		
<i>Use Name</i>	<i>Description</i>	<i>Site Area</i>
Gym space	Stand alone day camp or added feature of other group rental	Gym
Athletic Events	Space to host events of local or regional athletic groups	Gym
Dance Classes	Classes offered by City or the BCC, 10 students per week for entire season	Gym
Sports Fields		Open Space
Adventure Course	Classes offered by City or the BCC, 15 students per class, one class per week for season	Adventure Course
Source: Fairweather Consulting		

Continued increases in visitation to the site to drive revenues from entrance fees to \$92,820 in Phase 3, based on annual visitation of 15,470 and an increased entrance fee of \$6. As described in the Sensitivity Analysis section that follows later in this report, entrance fees represent a major contributing factor to the site’s financial viability. During Phase 3, with entrance fees at \$6 per person, it would take a significantly lower-than-expected visitation number to cause the projected budget surplus to a deficit. Specifically, visitation to the site would need to drop below 11,000 paid visits per year in order to flip the results of our analysis.

Increased rental occupancy rates push revenues from rental fees up to \$158,730 in Phase 3. Responding to increased visitation and awareness, as well as additional facilities at the site, revenues from activities and from concessions will increase also, to \$21,936 and \$4,739 respectively. See Appendix C for a detailed listing of occupancy rates and base fees for rentals and activities during Phase 3. The City’s current level of support is assumed to continue, as well, adding \$36,500 to the site’s revenues.

With all recommended site and building improvements completed, we expect the annual cost (principle plus interest) of building improvements to increase to \$84,509 and site improvements to increase to \$86,600.



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Table 25. Phase 3 Building Improvements	
<i>Building/Area</i>	<i>Estimated Cost</i>
Gym	(\$80,000)
Woodshop/Office Area	(\$40,250)
Adventure Course	(\$22,500)
Source: The Chazen Companies	

Table 26. Phase 3 Site Improvements		
<i>Improvement</i>	<i>Description</i>	<i>Estimated Cost</i>
Lighting	Improved lighting throughout the site	(\$150,000)
Sewer	Municipal sewer connection	(\$225,000)
Source: The Chazen Companies		

We expect site administration and maintenance costs to remain level at \$36,500, additional shared operating and maintenance costs to increase to \$36,572, and unique operating costs to total \$43,738.

According to our estimates, the University Settlement Camp could generate a modest operating surplus during Phase 3 of \$26,905 per year. The following table shows the balance of all costs and revenues for Phase 3. As with Phases 1 and 2, our analysis assumes continued support from the City's general budget of \$36,500 per year. During Phase 3, as with Phase 2, City support is needed to avoid an operating deficit, though the amount of support could decrease by nearly 75% while still maintaining a balanced budget on the USC site.

Table 27. Phase 3 Financial Viability										
<i>Expenses</i>					<i>Revenues</i>					<i>Surplus / (Deficit)</i>
<i>Site Imprv</i>	<i>Site Ops</i>	<i>Bldg Imprv</i>	<i>Bldg Maint</i>	<i>Prgm Ops</i>	<i>Entrance Fees</i>	<i>Rentals</i>	<i>Activities</i>	<i>Concessions</i>	<i>City Budget</i>	
(\$86,600)	(\$36,500)	(\$84,509)	(\$36,572)	(\$43,887)	\$92,820	\$158,730	\$21,936	\$4,739	\$36,500	\$26,905
Source: Fairweather Consulting										



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Sensitivity Analysis

A variety of factors will affect the actual revenues and expenses associated with the implementation of the recommended configuration of uses at the University Settlement Camp property. As stated earlier, our financial projections are based on a number of assumptions, which we believe are supported by evidence. However, it is worth noting whether the final outcome of our analysis – namely, that the operation and maintenance of the University Settlement Camp, if properly managed, can avoid operating deficits – is particularly sensitive to any changes in assumptions or other model inputs.

Total cost of site and building improvements – the combined cost of improvements to buildings and to the site as a whole represents the biggest cost to the City of operating and maintaining the site. Our analysis is based on estimated costs provided by the Chazen Companies. Full structural analyses of the buildings and detailed estimates for improvements were not required under the scope of work for this project, and so the Chazen Companies' estimates are preliminary figures which the City should verify through detailed estimates where appropriate. Since our analysis recommends financing these improvements through 15-year bonds at 8% annual interest, small changes in the principle amount of these bonds are unlikely to have a significant impact on the outcome of our financial projections. However, large increases in the amount borrowed (or the interest rate) could negatively affect the outcome of our analysis, effectively erasing the modest operating surpluses we have projected.

The following table shows how varying annual debt payments affect the net fiscal impact for each Phase of the proposed site configuration. The cells highlighted in yellow represent our estimate of the most likely range given our estimates of annual debt payments for site and building improvements.



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Table 28.
Sensitivity Analysis – Debt Service Costs in Phase 3

		<i>Annual Debt Payment (in Phase 3) for Building Improvements</i>							
		<i>(\$50,000)</i>	<i>(\$60,000)</i>	<i>(\$70,000)</i>	<i>(\$80,000)</i>	<i>(\$90,000)</i>	<i>(\$100,000)</i>	<i>(\$110,000)</i>	<i>(\$120,000)</i>
Annual Debt Payment (in Phase 3) for Site Improvements	(\$50,000)	\$97,914	\$87,914	\$77,914	\$67,914	\$57,914	\$47,914	\$37,914	\$27,914
	(\$60,000)	\$87,914	\$77,914	\$67,914	\$57,914	\$47,914	\$37,914	\$27,914	\$17,914
	(\$70,000)	\$77,914	\$67,914	\$57,914	\$47,914	\$37,914	\$27,914	\$17,914	\$7,914
	(\$80,000)	\$67,914	\$57,914	\$47,914	\$37,914	\$27,914	\$17,914	\$7,914	(\$2,086)
	(\$90,000)	\$57,914	\$47,914	\$37,914	\$27,914	\$17,914	\$7,914	(\$2,086)	(\$12,086)
	(\$100,000)	\$47,914	\$37,914	\$27,914	\$17,914	\$7,914	(\$2,086)	(\$12,086)	(\$22,086)
	(\$110,000)	\$37,914	\$27,914	\$17,914	\$7,914	(\$2,086)	(\$12,086)	(\$22,086)	(\$32,086)
	(\$120,000)	\$27,914	\$17,914	\$7,914	(\$2,086)	(\$12,086)	(\$22,086)	(\$32,086)	(\$42,086)

Source: Fairweather Consulting

Total fees from rentals – the biggest source of revenue in our financial projections is rental fees charged by the City for use of site facilities. These revenues are based on two factors: occupancy (or the number of rentals) and rental rates charged. Our analysis suggests that the rental rates currently charged by the City are, for the most part, reasonable, though according to the agreement with NYS Parks, they must be equalized for residents and non-residents. We do not expect that the rental rates charged for site facilities are likely to change, and so the outcomes of our analysis are dependent on the number of rentals. There is a great deal of uncertainty about the frequency with which site facilities will be occupied, particularly given the need first for building repairs and improvements. Given the current condition of the buildings and the City’s understandable hesitancy to promote rental uses at this point, current occupancy rates are unlikely to be a good basis for future estimates. However, certain buildings, such as the Stover Theater, the Pool and the Infirmary have already proven to be popular rentals. As such, we have estimated higher occupancy rates for these facilities, and have deliberately estimated all other facilities to have an initial occupancy rate of 5% or lower. Additional details, including a list of rental and activity occupancy rates are provided in Appendix C.



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The following table describes how changes in the revenues from rentals and activities on the site could affect the overall financial viability of the site’s operations. The cells highlighted in yellow represent our estimate of the most likely range given our estimates of annual revenues from rentals and activities on the site.

Table 29. Sensitivity Analysis – Revenues from Rentals and Activities in Phase 3							
		<i>Annual Revenues (in Phase 3) from Activities</i>					
		\$30,000	\$25,000	\$20,000	\$15,000	\$10,000	\$5,000
Annual Revenues (in Phase 3) from Rentals	\$180,000	\$56,240	\$51,240	\$46,240	\$41,240	\$36,240	\$31,240
	\$170,000	\$46,240	\$41,240	\$36,240	\$31,240	\$26,240	\$21,240
	\$160,000	\$36,240	\$31,240	\$26,240	\$21,240	\$16,240	\$11,240
	\$150,000	\$26,240	\$21,240	\$16,240	\$11,240	\$6,240	\$1,240
	\$140,000	\$16,240	\$11,240	\$6,240	\$1,240	(\$3,760)	(\$8,760)
	\$130,000	\$6,240	\$1,240	(\$3,760)	(\$8,760)	(\$13,760)	(\$18,760)
	\$120,000	(\$3,760)	(\$8,760)	(\$13,760)	(\$18,760)	(\$23,760)	(\$28,760)
	\$110,000	(\$13,760)	(\$18,760)	(\$23,760)	(\$28,760)	(\$33,760)	(\$38,760)

Source: Fairweather Consulting

Annual visitation – over the seven year period of our analysis, we have estimated that revenues from site entrance fees will increase by nearly 400%. While this seems optimistic, our research into regional recreation trends and spending patterns supports this estimate. However, if visitation does not increase as quickly as expected, the resulting reduction in revenues from entrance fees could adversely affect the financial viability of the site.

The following table shows how our estimated surplus/deficit changes when visitation figures or entrance fees change. The cells highlighted in yellow represent our estimate of the most likely range given our estimates of annual visitation and entrance fees.



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Table 30.
Sensitivity Analysis – Visitation and Entrance Fees in Phase 3

		<i>Entrance Fee (Per Person, Phase 3)</i>					
		\$8.00	\$7.00	\$6.00	\$5.00	\$4.00	\$3.00
Estimated Paid Visitors per Year (Phase 3)	18,000	\$78,084	\$60,084	\$42,084	\$24,084	\$6,084	(\$11,916)
	17,000	\$70,084	\$53,084	\$36,084	\$19,084	\$2,084	(\$14,916)
	16,000	\$62,084	\$46,084	\$30,084	\$14,084	(\$1,916)	(\$17,916)
	15,000	\$54,084	\$39,084	\$24,084	\$9,084	(\$5,916)	(\$20,916)
	14,000	\$46,084	\$32,084	\$18,084	\$4,084	(\$9,916)	(\$23,916)
	13,000	\$38,084	\$25,084	\$12,084	(\$916)	(\$13,916)	(\$26,916)
	12,000	\$30,084	\$18,084	\$6,084	(\$5,916)	(\$17,916)	(\$29,916)
	11,000	\$22,084	\$11,084	\$84	(\$10,916)	(\$21,916)	(\$32,916)
	10,000	\$14,084	\$4,084	(\$5,916)	(\$15,916)	(\$25,916)	(\$35,916)
	9,000	\$6,084	(\$2,916)	(\$11,916)	(\$20,916)	(\$29,916)	(\$38,916)
	8,000	(\$1,916)	(\$9,916)	(\$17,916)	(\$25,916)	(\$33,916)	(\$41,916)

Source: Fairweather Consulting

Physical Site Maintenance Plan

The University Settlement Camp Property site features and buildings were inventoried in the attached Site Features and Building Inventory list (see Appendix B). The proposed Cost of Capital Improvements has been included for each of the recommended improvements or renovations. The following narrative describes the expected phased approach to secure the property and begin the renovations to implement the recommended configurations of site uses.

The first phase of the project includes clearing, site access and demolition of buildings determined to be deteriorated beyond repair and structurally unsound. The clearing budget line item includes removal of trees which are falling and damaging buildings and clearing to provide access to the site.



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The temporary road access to the rear portion of the site budget line item includes installation of temporary gravel roads to allow construction and demolition equipment to enter the areas required to access the demolition sites. Demolition and removal of Robin Bungalow #19, Robin Bungalow #22, and Southeast Building #39 are all recommended and budgets for the removal of these three buildings have been included as the buildings have been extensively damaged and are structurally unsound.

The next phase of the project includes general drainage improvements throughout the site in preparation for permanent gravel roads. Budget line items for both of these site improvements have been included and are recommended to access the building renovation sites. Further site feature improvements of parking, lighting and signage may be implemented in future phases as development of the prioritized building renovation list is established.

Individual building renovations recommended include foundation repairs and improvements where necessary, step and landing repairs, roof structure repairs where noted, re-roofing, painting, window installations and plumbing installations. The selected prioritized building list will determine the total of the budget line items required to implement the recommended configurations of site uses (see the Recommended Configuration beginning on page 40). Phasing of the renovations to complete individual buildings to a schedule will determine the planned budget.

The final site feature capital cost improvement recommended is a municipal sewer connection. The buildings are currently serviced by individual subsurface wastewater infiltration systems. As renovations progress and the buildings become utilized, the need for a central sewer system may become apparent as the individual infiltration systems become active. Testing of the individual systems is recommended as buildings are renovated to determine the optimum timing to plan for the capital improvement of a site-wide municipal sewer connection.

Task 7. Implementation

As described above, we recommend a three-phased implementation of new uses and the corresponding site and building improvements. Through this approach, we expect that the site will avoid operating deficits that would drain resources away from other City projects. As we have pointed out, though, the biggest cost associated with the site is the cost of making needed improvements to site infrastructure and facilities.



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During the Stakeholder Meeting and the Public Meetings, several interesting solutions to the high cost of site and building improvements were proposed. One recommendation was to use volunteer labor to complete simple building repairs, such as painting and cleaning. Another was to solicit contributions of labor and supplies from local contractors or local unions. Finally, many meeting participants suggested that the City pursue funding from Private Foundations and state sources to support the capital improvements to the site.

All of these suggestions are valuable, and we highly suggest that the City consider steps that can be taken immediately toward the implementation of these ideas. This section outlines several specific action steps related to the topic of fundraising and management of volunteers. As well, we close this section, and our Master Plan document, with a high-level outline of recommended next steps for the University Settlement Camp.

Organizing Volunteer Support

During our many meetings and discussions related to the University Settlement Camp Master Plan, we were impressed by the high level of enthusiasm and support expressed for the site. While our financial analysis assumes that all capital and operating costs must be paid through revenues from the site, it seems likely that, if properly organized and managed, volunteer contributions of labor and materials could reduce the cost of operating and maintaining the University Settlement Camp property.

One suggestion from the Public Meetings was to create a “Friends of the USC Park” group, possibly as a separate nonprofit corporation. We support the idea of a coordinated volunteer group, whether it is a separate organization or a loose association of interested residents and organizations convened by City officials. This group could be tapped to reach out to local unions to ask for volunteers, to coordinate a work schedule with the Beacon Womens’ Correctional Facility, and even to begin the process of completing grant applications. As well, this group could organize periodic “volunteer days” at the site to do clean-ups, painting and basic maintenance activities.

Funding Sources

Based on the frequency with which Private Foundation and State grants were suggested as sources of support for the site, Fairweather Consulting conducted a brief review of potential funding sources to identify funding prospects that appear to be the most likely supporters of projects related to the



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University Settlement Camp. The following table summarizes the funders that were identified as having a potential to fund such projects. Additional information is provided in Appendix D.

Table 31. Potential Funding Sources					
<i>Funder</i>	<i>Geographic Focus</i>	<i>Recreation/ Open Space Focus</i>	<i>Capital Projects</i>	<i>Match Required?</i>	<i>Maximum Amount</i>
Dyson Foundation	Hudson Valley		X	No	N/A
Hudson River Valley Greenway	Hudson Valley	X	X	Yes	\$10,000
Heckscher Foundation for Children	Greater NYC	X	X	No	N/A
Icahn Charitable Foundation	New York State	X	X	No	N/A
Carl C Icahn Foundation	Greater NYC	X	X	No	N/A
Lowe's Charitable & Educational Foundation	National	X		No	N/A
McCann Charitable Trust & Foundation	Dutchess County	X	X	No	N/A
New York Mets Foundation	Greater NYC	X	X	No	N/A
New York State Parks (EPF, Title 9)	New York State	X	X	Yes	N/A
Jeannette F. Schlobach Article 4 Trust	Poughkeepsie		X	No	N/A
Wilpon Family Foundation	Greater NYC	X	X	No	N/A
Source: Fairweather Consulting					

Implementation Timeline

All of the analyses described above suggest that the City should move forward with the phased approach to programming and improvements to the University Settlement Camp property. The following table summarizes our recommended next steps in this process.

Table 32. Implementation Timeline			
<i>Step</i>	<i>Task</i>	<i>Responsible</i>	<i>Timeline</i>
1.	Review draft plan with City Council and NYS Parks	Fairweather Consulting, City Administrator	October 2009
2.	Hold a public meeting to review the Master Plan	Fairweather Consulting, City Administrator	October 2009
3.	Perform structural analysis and gather detailed	City of Beacon	October – December



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Table 32. Implementation Timeline			
<i>Step</i>	<i>Task</i>	<i>Responsible</i>	<i>Timeline</i>
	estimates for largest capital projects		2009
4.	Reach out to local unions, the Beacon Women's Correctional Facility and other potential volunteers	City of Beacon	October – December 2009
5.	Organize fundraising efforts and submit letters of inquiry/applications to potential funders	Interested Citizens, City of Beacon, Fairweather Consulting	October – December 2009
6.	Issue bid solicitations for Phase 1 construction	City of Beacon	January – March 2010
7.	Begin Phase 1 construction	City of Beacon	Spring 2010
8.	Implement Phase 1 uses/site configuration	City of Beacon	Fall 2010
Source: Fairweather Consulting			