

Preliminary Feasibility Assessment for a Retreat and Study Center at The Shire

Final Report

Submitted to:

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Executive Summary

The purpose of this report is to assess whether the proposed study and retreat center at the Shire, as presently conceived, is financially feasible. To answer this question we assessed demand for the facility from various target user groups, which allowed us to estimate revenues and expenses for two operational models. At the most fundamental level, costs and revenues are the key determinants of financial feasibility. Both these variables, however, are highly dependant on issues related to facility design, mission, marketing, and operations.

Methods

CPW took the following steps to conduct the feasibility assessment: (1) review of key documents; (2) survey of UO departments; (3) interviews with potential user groups; and (4) case studies of comparable organizations. CPW used this information, combined with the facility concept, to develop cost and revenue estimates for the proposed facility.

The feasibility assessment is based on the current facility concept. The key assumptions underlying CPW's analysis include:

- The facilities will be approximately 17,000 square feet, will have overnight accommodations for approximately 40 people, and will have a maximum meeting capacity for about 60 people.
- The mission of the facility is narrowly focused on education around architecture and allied arts.
- The mission, combined with site use restrictions, narrows the range of potential user groups to UO programs, and organizations that are related to architecture and allied arts education and professional organizations.
- AAA desires the facility to operate at least at a break-even level on operations and maintenance costs. Capital costs are external to the feasibility assessment.

Conclusions

Based on CPW's research, our preliminary feasibility analysis suggests that **given the current assumptions of needed staff levels and low use, the Shire is not financially feasible.** To determine financial feasibility, CPW modeled three different scenarios: (1) low use and low expenses; (2) high use and low expenses; and (3) high use and high expenses. Given the assumptions used in the model, CPW's assessment is that the most likely scenario will result in an annual deficit of approximately \$70,000. Under more generous assumptions (high use and low expenses) the Shire *may* break even.

The Shire could become financially feasible if use for the Shire can be increased and/or if the number of staff needed to produce the desired level of service can be made more efficient. We think it is much easier to expand the base of potential users than to achieve operational efficiencies. The level of service that is ultimately settled on will have a big impact on the types of groups that are attracted to the Shire, and perhaps more importantly, on fees.

Key Considerations

Although CPW concluded that the Shire is not financially feasible based on the current facility assumptions, the Shire could be potentially be made feasible through some changes in the operations and design of the facility. Key considerations include:

- **Staffing:** Staffing levels impact what type of groups will use the facility. Staff costs must be balanced with desired level of service and requirements of target user groups. CPW identified comparable facilities that had as few as two full time staff members.
- **Target user groups:** The desire to restrict the type of user groups must be balanced with the reality of needing to generate revenue. Targeting a broader array of groups will increase marketing opportunities and use.
- **Programs:** Providing programs at the Shire could attract desired user groups; however, programs create additional costs and burden on staff time.
- **Scheduling:** The manner that the facility is scheduled can directly relate to its financial success. Key considerations include: who gets priority, how is priority assigned, are specific dates or chunks of time held opened for the group with greater priority, and are certain groups given an early opportunity to schedule the facility.
- **Seasons of operation:** Closing the facility for a certain period of time would reduce costs and may better reflect demand, but closing the facility might make it hard to find and maintain high quality staff.
- **Services:** Providing services such as linen, housekeeping, and technical support play a part in attracting user groups. The costs of the services must be balanced with the use of the facility.
- **Food service:** Deciding how to provide food will have potentially big impacts on the type and amount of use. Hiring kitchen staff facilitates a higher level of service that could attract user groups; however, actual use of the facility may not justify having kitchen staff.

In conclusion, the proposed study and retreat center at the Shire could be a fantastic resource for the University of Oregon and the Pacific Northwest Region. The project, however, as presently conceived appears to pose considerable financial risk. If the project moves forward, the Advisory Committee should explore creative ways to increase use while maintaining minimal, yet sufficient, staffing levels. Options could include phasing the development by beginning with a day-use pavilion; developing special interest programs to attract users to the site; and a long-term marketing strategy.

Chapter 1

Introduction

This report presents a preliminary financial feasibility assessment for the proposed retreat and meeting facilities at the Shire. The assessment includes a description of a design program developed in June 2005, a review of comparable facilities, and an assessment of costs and revenues related to operations and maintenance of the proposed meeting facilities. The report also includes a set of conclusions, and identifies key factors the Shire Advisory Group should consider as it determines what steps to take next in the process.

Background

The Shire: John Yeon Preserve for Landscape is a 75-acre site located in the Columbia River Gorge directly across from Multnomah Falls. It is a preserve that emphasizes design and solitude in nature. John Yeon was a self-trained designer whose work encompassed whole landscapes, gardens, buildings, interiors, and furnishings. Yeon was committed to the preservation and enhancement of Oregon's landscape from an early age and was deeply involved in civic activities toward this end. As part of his work and activities, he purchased the Shire property in 1965 to protect it from possible industrial development and create a personal landscape preserve. Over the subsequent 30 years, Yeon created a landscape that includes sculpted lawns, walking paths, vistas, meadows, forests, wetlands, and river bays.

After his death in 1994, the trustees of the estate of John Yeon gave the Shire to the School of Architecture and Allied Arts (AAA) at the University of Oregon. AAA accepted the gift of the Shire and undertook preserving it and making it accessible as a place for education.

The School of Architecture and Allied Arts has proposed building a Retreat and Study Center at the Shire to allow students, professors, design professionals, planners, and artists access to the Shire, while protecting John Yeon's vision of the Shire. A Retreat and Study Center at Shire would serve the following purposes:

1. provide field-based educational facilities for the programs in AAA;
2. provide an opportunity to explore ideas related to architecture and allied arts;
3. be a place to experience the Columbia River Gorge; and
4. be a place for reflection and solitude.

Students, professors, design professionals, planners and artists alike would be able to develop deeper understandings of landscape

preservation, ecology, landscape design, planning, Gorge preservation and the importance of collaboration between disciplines.

Purpose and Methods

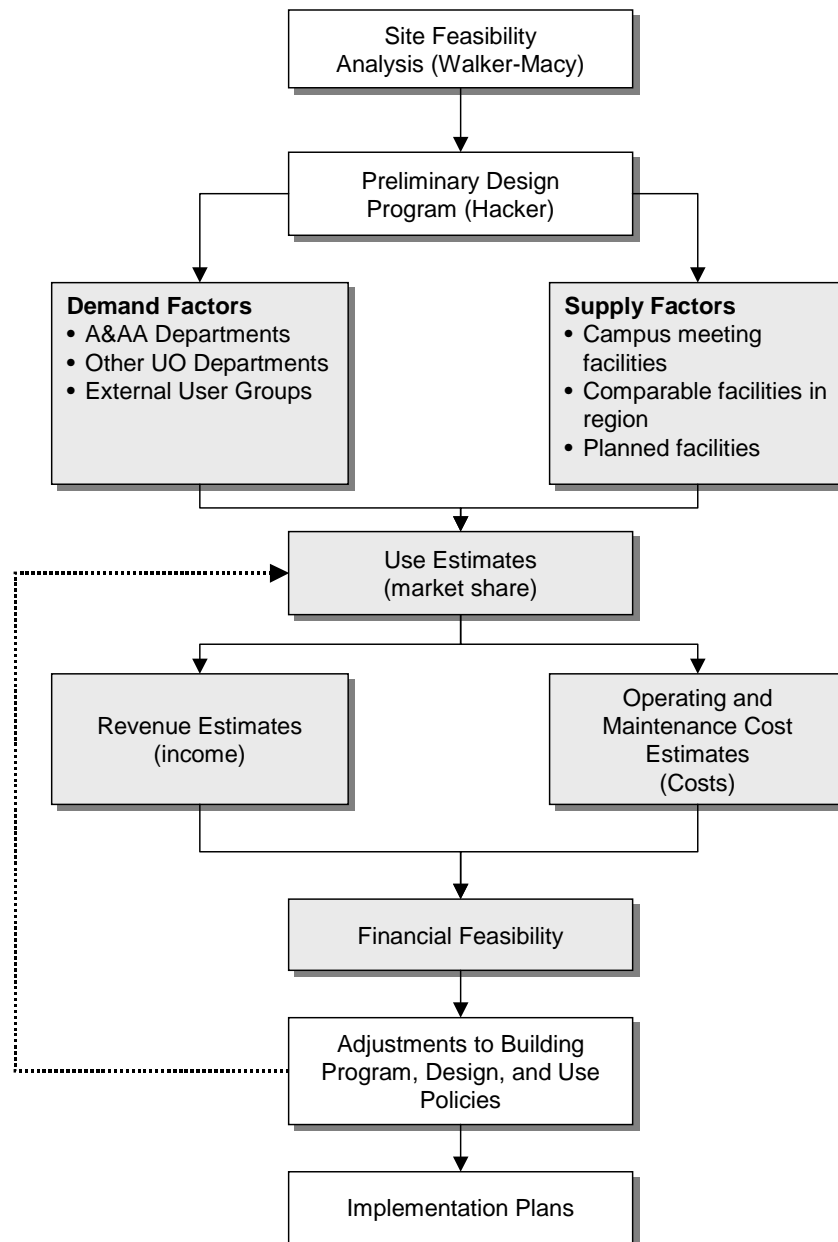
The AAA Foundation under the guidance of the Shire Advisory Group requested the Community Planning Workshop (a research and educational program affiliated with AAA) prepare a preliminary market analysis and financial feasibility assessment for the proposed retreat and study center at the Shire.

Specifically, this report presents:

- **An analysis of comparable facilities.** This section details the size, operational structure, and location of seven field-campus retreat centers. The analysis includes a summary of the fees charged for meeting spaces, information about types of programs, and budget and staffing costs.
- **An overview of target user groups.** The key purpose of this section is to assess interest in use (referred to in this report as demand) of the proposed facility among campus user groups inside and outside of AAA, and related professional and other groups. The overview includes data about the frequency and size of meetings that require off-campus space, how much user groups pay for the space, and what other facilities and amenities they need for their meetings.
- **A summary of use and revenue estimates.** This includes a preliminary evaluation of the feasibility based on use estimates and a series of differing operational models and their associated costs. CPW identifies risks associated with development of the facility and presents a set of recommendations regarding the operational models that appear most appropriate for the proposed retreat center.

Figure 1-1 shows the steps in the program design and preliminary feasibility assessment. The boxes that are shaded with gray represent the steps that CPW addresses in this report. Market and feasibility analyses must consider both *demand* factors and *supply* factors that affect the proposed facility. CPW's work program addressed these relationships as well as identified issues that relate to the facility's design.

Figure 1-1. Steps in the program design and preliminary feasibility assessment



The process began with a site feasibility assessment (the Walker-Macy study). After determining that development could occur on the site, the next step was to prepare a design program (the Hacker study). The design program, combined with basic information about the facility emphasis and potential user groups form the basis for the feasibility assessment. We call this a *preliminary* feasibility assessment because it is based on a set of assumptions related to the design program, the facility emphasis, and limitations on user groups. Changes to any of these assumptions would impact the cost and revenue structure of the facility.

The next steps are fairly standard in market analysis and feasibility studies. Based on the design program and facility focus, we evaluate demand factors (e.g., the size of the market of potential users) and supply factors (e.g., comparable facilities that will compete with the Shire). That analysis leads to use estimates which have implications for management and staffing and allow estimates of both costs and revenues. The cost and revenue analysis allows determination of the financial feasibility of the facility. Figure 1 also illustrates that the result of the financial feasibility assessment may lead to changes to the design program and use policies which in turn can affect use.

To analyze the market and feasibility for the proposed retreat center, CPW gathered a variety of information. CPW took the following steps to conduct the assessment:

- **Document review.** CPW initiated the project by reviewing key documents—the site feasibility and design program were among the most important.
- **Campus user survey.** CPW assessed demand from other campus departments by developing and administering a survey to UO Deans, Directors, and Department heads. The survey gathered information on the types of meetings departments hold off-campus, and the possible uses they might have for the Shire. CPW mailed a total of 419 surveys and received 52 responses for a 12% response rate.
- **Potential user group interviews.** CPW contacted 46 potential user groups to determine the level of interest in the meeting facilities at the Shire, and the types of amenities potential users prefer.
- **Case studies.** CPW conducted case studies of seven comparable facilities to better understand operational issues and models, financial characteristics, and factors that contribute to a successful facility.

This research program allowed CPW to develop a pro-forma financial model that evaluates several use levels and operational structures. It also provided us with key insights into issues related to the operation and maintenance of a successful retreat center.

Organization of this report

The remainder of this report is organized as follows:

- **Chapter 2: Proposed Shire Development Program** presents an overview of the Shire's facility program, types of proposed spaces, potential user groups, costs, and siting issues. It is a summary of the Walker-Macy study and the Hacker facility program.
- **Chapter 3: Overview of Comparable Facilities** presents the results of seven case studies of comparable university owned and

non-profit field-campus retreat and study centers. Each case study includes data on facility budgets and operational models.

- **Chapter 4: Analysis of Target User Groups** summarizes the demand for retreat space of potential campus and off-campus user groups. Included in this section are findings from the University of Oregon user survey and interviews with potential other users including professional organizations and non-profit groups.
- **Chapter 5: Preliminary Financial Feasibility Assessment** presents a summary of CPW's use and revenue estimates for the proposed facility. This section also evaluates staffing requirements, operational models, and maintenance costs of the proposed Retreat and Study Center.
- **Chapter 6. Conclusions and Considerations** presents a summary of CPW's research and a list of consideration for the Shire Advisory Group to discuss.

This report also contains several appendices:

- Appendix A. Survey of UO Deans, Directors, and Department Heads
- Appendix B. Summary of Interviews with Potential Users
- Appendix C. Summary of Comparable Facilities

Chapter 2

Proposed Shire Development Program

This chapter provides a summary of previous studies addressing the potential development of a retreat and study center at the Shire, including the December 2004 “Feasibility Study for a Retreat and Study Center,” conducted by Walker Macy, and the July 2005 “Program Confirmation”, conducted by Thomas Hacker Architects. The Walker Macy study investigated the regulatory and political feasibility of developing a Retreat and Study Center at the Shire. The Hacker study investigated philosophical goals and potential use of the Shire by individual AAA departments.

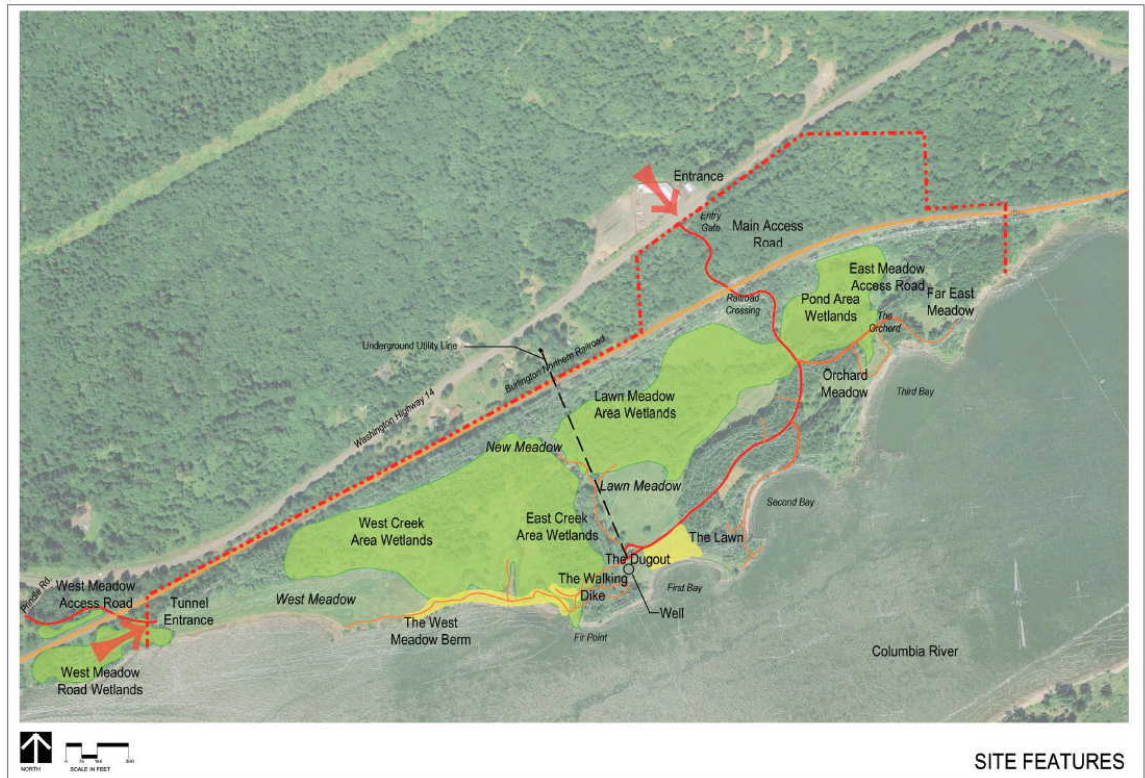
This chapter includes a brief history of the Shire, a summary of current conditions at the Shire, and a summary of proposed development plans for the Retreat and Study Center.

Site characteristics

The Shire is located in Skamania County Washington, along State Highway 14. It is bounded by the Columbia River on the south and Highway 14 on the north and is accessible via Highway 14. The Shire encompasses a variety of natural habitats, including wetlands, meadows, woods, shorelands, and a series of bays along the Columbia River. The Burlington Northern Railroad runs across the site from west to east, dividing the property in two parts, creating an upper and lower portion of the site.

Existing development on the Shire consists of landscaping, a two-track gravel road, and a concrete bunker. The gravel road provides access to the site from Highway 14 and leads to the lower meadows in the southern part of the site. The only structure on the site is a concrete bunker, which is used for storage.

Figure 2-1. Site Features at the Shire



Source: Feasibility Study for a Retreat & Study Center, Walker Macy, December 2004.

Constraints

The Walker-Macy study identified several site constraints that must be considered in any development plan. These constraints are related to the presence of the railroad, flooding and wetland concerns, lack of infrastructure, and the regulatory setting of the Gorge. The key constraints identified in the Walker-Macy study are summarized below.

The Burlington Northern Railroad tracks divide the Shire into upper and lower sections. The right-of-way for the Railroad is approximately 50 feet on either side of the tracks. There is an existing ungated, on-grade crossing for the gravel road, which is sufficient for current uses but may not be appropriate if vehicle access to the lower site increases.¹

According to a representative from Burlington Northern and Santa Fe Railroad, about 45 freight and Amtrak trains run on these tracks per day. The trains come at varying times, sometimes as frequently as four per hour. The trains travel approximately at a speed of about 50 miles per hour through the site. The noise from trains varies depending on

¹ Walker Macy, *Feasibility Study for a Retreat & Study Center*, p. 3. December 2004

location. If the upper site is developed, the design may need to include measures to decrease noise from the trains.

The railroad presents several constraints. First, it presents a danger to pedestrians and vehicles crossing the tracks. Secondly, it presents a challenge for developing infrastructure on the lower portions of the site because of permitting requirements for a private crossing. In addition, getting infrastructure, such as water, sewer, power, or telecommunications, to the lower portion of the site would require a crossing permit from the railroad. Finally, trains generate a significant amount of noise as they pass through the site.

The Walker-Macy study suggests that plans for developing the Shire should consider limiting vehicle access to the lower site, providing pedestrian access, and the feasibility of providing infrastructure including water, sewer, power, or telecommunicationsto the lower portion of the site. The process to obtain permits for a new railroad crossing is complex and can take significant amounts of time. Although renewal of the existing permit for an at-grade crossing should be relatively simple and may take about six months, obtaining permits for above ground or below grade permits is probably more complex and could take longer.²

Flooding and wetlands are constraints for much of the lower portion of the Shire. The majority of land south of the railroad tracks is within the 100-year flood plain. Significant portions of the lower site were inundated in the 1996 flood, and the property experienced severe erosion along the shoreline.³ Moreover, considerable portions of the lower site are wetland areas.

Infrastructure availability is also a concern for development at the Shire. Although the Shire has power and telephone service, public water and sanitary sewer are not available to the site. Since public water is unavailable, a new well will need to be drilled. Past experience in the area indicates that it may be difficult to find good water on the site.⁴

Since the site is not served by a public sanitary sewer system, any development will require on-site treatment. The soils in the upper section of the site are above the 100-year flood plain and are generally acceptable for septic system drain fields. The soils on the lower portion of the site are within the 100-year floodplain and not acceptable for conventional septic treatment.⁵

Regulatory barriers are a major constraint in developing the Shire. The entire site is within the Columbia River Gorge National Scenic

² Walker Macy, *Feasibility Study for a Retreat & Study Center*, p. 4.

³ Walker Macy, *Feasibility Study for a Retreat & Study Center*, p. 4.

⁴ Walker Macy, *Feasibility Study for a Retreat & Study Center*, p. 6.

⁵ Walker Macy, *Feasibility Study for a Retreat & Study Center*, p. 7.

Area, which adds an additional layer of regulations. As a result, development in the Shire is subject to regulation by Skamania County, Washington State, the U.S. Forest Service, and the Columbia River Gorge Commission. Other groups involved with development on the site include four Indian tribes with local interest, including Nez Perce, Umatilla, Warm Springs, and Yakama Nation.⁶

Skamania County regulates land use within the area. County development review would include obtaining a County Health Department Site Evaluation permit, which is designed to identify problems with water or sewage capabilities. With approval from the Health Department, the next step is to file a Land Use Application and a Joint Aquatic Resources Permit Application (JARPA) if development is proposed within the shoreline management zone. The purpose of the land use application is to ensure that the proposed development conforms to County regulations, such as zoning. The purpose of the JARPA is to minimize impacts on wetlands and shoreline areas.⁷

Other concerns that must be addressed in the development and regulatory process include: location of any sensitive habitat for plants or wildlife; intensity of development permitted at the site; appropriateness of development to the landscape; visual impact of the development on the site from "Key Viewing Areas" identified around the Gorge; visual effect on Highway 14, which is a "scenic travel corridor"; and shoreline regulations and conservation on areas within the floodplain or near to the River.⁸

According to the Walker Macy study, obtaining the required development entitlements would take seven months or more from the beginning to the end of the application process.

Opportunities

The Shire has a number of attributes that make developing the site an attractive idea. These opportunities capitalize on the Shire's sense of place, opportunity for sharing John Yeon's vision, its location, and opportunities for learning about the Gorge's ecosystem and cultural heritage.

Sense of place is one of the Shire's most important characteristics. The natural beauty of the Gorge, proximity to the Columbia River, and unique landscaping create a unique setting.

Sharing and educating people about John Yeon's work and vision for the Shire is another opportunity. Through 30 years of work, John Yeon created a unique landscape and opportunities for discovery. Developing a Retreat and Study Center on the site would provide the chance for

⁶Walker Macy, *Feasibility Study for a Retreat & Study Center*, p. 9.

⁷ Walker Macy, *Feasibility Study for a Retreat & Study Center*, p. 9.

⁸ Walker Macy, *Feasibility Study for a Retreat & Study Center*, p. 9-18.

people to become more familiar with John Yeon's work and explore his vision for the Shire.

Accessibility and location are tremendous opportunities for the Shire.⁹ The Shire is easily accessible via Highway 14. It is located about one hour from Portland and about 2.5 hours from Eugene. It is also accessible to Olympia and Seattle within a few hours drive. In addition, the Shire, which is located directly across from Multnomah Falls, has spectacular views of the falls and Columbia River.

The educational value of the ecosystem and cultural heritage is a significant opportunity for University of Oregon students and faculty and others in Oregon and Washington. The Shire offers opportunities for educational experiences in multiple disciplines, from landscape architecture to natural resource management.

Preliminary Design Program for the Proposed Study and Retreat Center

Any development on the Shire site would need to honor the John Yeon's vision. This vision places limitations on both the types of facilities and the types of uses that would be appropriate at the Shire. Based on our review of the site feasibility assessment and design programs, as well as conversations with members of the Shire Advisory Group, CPW makes the following assumptions regarding development of the Shire:

- Structures would be limited to the upper portion of the site due to physical features;
- The facilities would be modest in scale and consistent with the carrying capacity of the site;
- User groups would be limited to those that have educational missions or missions related to architecture and allied arts.

Thus, while the proposed Study and Retreat Center could accommodate many potential user groups, the emphasis would be on departments within the School of Architecture and Allied Arts, other departments and centers within the University, and outside professional groups that are involved with the arts, architecture, planning, and conservation.

Depending on the specific type and configuration of facilities at the Shire, it could be used for a variety of activities including: conducting classes and studios; overnight retreats; day meetings; and an opportunity for visiting professors or scholars to live and work in the Gorge.

According to the Walker Macy and Hacker reports, the preliminary plans are for a facility large enough to accommodate groups of 40 to 60 people, with sleeping accommodations for 40 people. Sleeping accommodations for short-term visitors are either four-person rooms or

⁹ Walker Macy, *Feasibility Study for a Retreat & Study Center*, p. 19.

two-person rooms. The plans include space for four combination residences and studios for long-term visitors. Table 2-1 shows the types of spaces proposed and their sizes from the Walker Macy and Hacker reports.

Table 2-1. Description of proposed spaces at the Shire from the Walker Macy and Hacker reports

	Walker Macy	Hacker
Meeting Spaces		
The Great Room	2,400 sf	1,750 sf
Exhibit space	--	300 sf
Small Library / Meeting Room	350 sf	350 sf
Lodging		
Overnight Quarters	4,000 sf	2,800 sf
Double Rooms	--	400 sf
Bathrooms	--	1000 sf
Studio	1,200 sf	2,000 sf
Crit/Review area	--	375 sf
Four Residence / Studios	4,000 sf	1,200 sf
Other Facilities		
Caretaker / Manager Apartment	1,200 sf	1000 sf
Caretaker's Workshop	--	400 sf
Wet Room	150 sf	150 sf
Center Office	150 sf	150 sf
Kitchen	750 sf	900 sf
Public Restrooms	450 sf	450 sf
30% for storage, circulation, utilities, structure	4,395 sf	3,968 sf
Total	19,045 sf	17,193 sf

Source: Shire Program Confirmation, Thomas Hacker Architects, July 2005

Development Schemes

There are a number of different development schemes for the Shire. One set of ideas comes from the Walker Macy study, which presented four potential development ideas. The other set of ideas comes from architecture studio classes taught at the UO in Winter and Spring of 2005. *These schemes are examples of what may be built at the Shire but they do not represent any firm plans for development.* Some high points of the various schemes are discussed below.

The Walker Macy schemes share several elements: focus of the development, location of parking areas, a main building, separate buildings for long-term living studios, and a separate caretaker's residence.

- The majority of the structures are placed in the area north of the railroad tracks and building several smaller scale buildings in

the eastern portion of the part of the property south of the railroad tracks.

- Parking areas are located in the northern portion of the property, relatively near the access road.
- Each scheme includes a main building, where the great room and kitchen facilities are located, as well as buildings for the living quarters and studio for live-in guests.
- Finally, the caretaker's residence is placed in the upper portion of the property, to the west of the main development.

The schemes differ in some significant ways. The differences include:

- The number and size of buildings of buildings vary, from six buildings with one large main building and five smaller ones to thirteen smaller buildings.
- The distribution of buildings between the upper and lower portions of the site varies. In one scheme, the only structures in the southeastern portion of the site are seasonal structures. In another scheme, all four residence / studios are located south of the railroad tracks.

The schemes developed by University of Oregon students in the architecture studio built off the ideas presented in the Walker Macy study. The schemes developed in the studios have the following unifying ideas:

- They use the contours of the land to create an organic feeling.
- The plans share a sense of simplicity and spareness, which creates a minimal impact on the site.
- The environmental systems, such as the heating and cooling, are interactive, such as opening a window.
- The development is reflective of but independent from John Yeon's landscape work. For example, the focus of all the development is on the upper portion of the site.

Figure 2-2. Conceptual rendering of facilities at the Shire



Source: Image by Jeffery Galbraith from "Shire Visions", Spring 2005.

The schemes presented in the Walker Macy study and developed by UO students in the Shire Studio class represent a range of conceptual ideas about development of the site. While these concepts provide interesting ideas and a foundation for a final development scheme, considerable work remains on the design aspects of the project.

Summary

The Walker-Macy study did not identify any fatal flaws that would preclude development of a study and retreat center at the Shire. The study, however, concluded that the site has considerable physical constraints. Moreover, the study suggests that any development will have to go through a rather complex entitlement process.

With respect to the development schemes and design program, it seems probable that any significant development will need to occur on the upper part of the site. The remainder of this study assumes that will be the case and that the design program will be more or less consistent with the conclusions of the Hacker study.

Chapter 3

Overview of Comparable Facilities

As the AAA contemplates development of a field campus at the Shire, it is instructive to consider the experiences of similar facilities. To this end, CPW identified seven facilities across the country that could serve as insightful models on the operation and design of a field school.

Selection of Case Studies

To select models that would be relevant to AAA and the Shire, CPW selected five facilities for study because they meet the following criteria: (1) owned by a university or college; (2) located away from the school's main campus; (3) outfitted with sleeping accommodations; and (4) available for use by some outside groups. The facilities CPW reviewed include:

- Ashokan Field Campus, State University of New York at New Paltz's
- Horn Field Campus, Western Illinois University
- Lorado Taft Field Campus, Northern Illinois University
- Oregon Institute of Marine Biology, University of Oregon
- Tilikum Center for Retreats and Ministries, George Fox University

Although similar in many respects, each of these field campuses is managed in a unique way. While these examples do not specifically relate to AAA programs, they provide useful insights into different ways that a remote campus facility can be successfully managed.

To broaden the range of examples and include facilities that are dedicated to the arts, CPW also reviewed two facilities that are not owned by a university. Facilities in this category were also selected because of their location in the Pacific Northwest. This combination of purpose and location suggests that the facility is catering to a market similar to that which the Shire may want to target. The facilities that meet these criteria and are presented in this chapter are:

- IslandWood, Bainbridge Island, Washington
- Sitka Center for Art and Ecology, Otis, Oregon

After identifying appropriate facilities for study, CPW conducted telephone interviews with management personnel at each site. Marketing, policy, and budgeting documents were obtained to gather

more detailed information about the day-to-day operation of the facilities.

Case Study Summary

The purpose of this section is to identify and synthesize trends in facilities: staffing, programs, services and funding structure within the case studies and to draw out important considerations that will help the Shire make informed decisions about potential operational models. Summaries of each case study are located in Appendix C.

Facilities

All facilities have at least one large and small meeting room. Most facilities have the Internet, TV, DVD, projectors and video conferencing equipment available. While a couple facilities have more meeting space than overnight space, most can accommodate the same ratio of day users and night users. In fact, Lorado Taft has more meeting space than overnight space; however, Director Dale Hoppe would like to make his overnight accommodations match the meeting space accommodation.

Lodging accommodations range from platform tents to private rooms, with most facilities accommodating the majority of guests in bunk beds. However, there is demand for private rooms among adults, exemplified by the Oregon Institute for Marine Biology's plan to turn the large one room group dorm building into a single room facility.

All the lodging buildings have at least one bathroom per building, and many had private bathrooms in the overnight lodges.

Staffing

Staffing levels vary greatly among the facilities dependent on size and programs offered. One facility has only three year-round staff (Sitka), while IslandWood employs 56 full time staff members. All the facilities have one or more staff members that live on-site. They also have a full or part-time staff member devoted to reservations and program coordination, and at least one devoted to maintenance or custodial work. Many facilities hire seasonal staff during the busiest times of year. Seasonal staff normally include program teachers and coordinators, cleaning staff and cooking staff.

Five of the seven facilities have kitchen staff that work either seasonally or full or part-time. However, at Horn Field Campus, groups are responsible for cooking their own meals or finding a catering company, and at Sitka Center for Art & Ecology guest bring their own food.

Figure 3-1 at the end of this chapter provides a summary of the seven case study facilities.

Programs

All of the facilities have staff available to coordinate and/or run programs. All the facilities except Sitka and the Oregon Institute of Marine Biology offer programs that specifically cater to youth groups. All the programs tend to focus on environmental education, team building and development skills, and recreational activities such as hiking, swimming, boating, and arts and crafts. Two facilities, the Oregon Institute of Marine Biology and IslandWood, also offer classes available for college credit.

Services

The facilities provide a range of services including homestyle meals, linens and housekeeping. Five of the seven facilities require that guests staying overnight use the meal plan. Costs for food and one night range from \$13 for university related groups at Ashokan to \$185 for non-profits at IslandWood.

Three facilities rent linens (\$5 to \$9), two facilities provide linens to guests (costs are included in overnight fee), one facility will provide linens only on an emergency basis, and one facility does not offer overnight stays.

Most facilities do not offer housekeeping during the customers stay. Rooms are generally cleaned after each group leaves. However, the Tilikum Center for Retreats and Outdoor Ministries offers housekeeping to groups that stay longer than three nights.

Funding Structure

The funding structures of the case studies range from heavily subsidized university owned facilities to private 501(c)(3) nonprofit organizations not associated with a university. IslandWood and Sitka are private nonprofits that depend on donations, grants, memberships and room, food, and program service fees to cover their costs.

Funding also ranges within university owned facilities. The Oregon Institute of Marine Biology and Lorado Taft both receive monetary support from their respective universities. However, other facilities such as The Tilikum Center for Retreats and Outdoor Ministries depend on grants, revenues and donations and receive no university subsidies.

Lessons Learned

The facilities described in this chapter range from accommodating six to over 100 guests. We found that the larger facilities cater to youth groups. An exception is The Oregon Institute of Marine Biology, which does not cater to youth groups but is highly subsidized by the University of Oregon. It will be important for the Shire to decide if they want youth groups to attend the facility and then market accordingly.

Most of the facilities have busy seasons during the fall, spring, and summer and have slow months in the winter. It will be important for the Shire to actively pursue guests for the winter season, or be prepared for a slower booking rate during this time.

Most facilities offer food service during all or part of the year. However, offering food service can take up a large percentage of the budget. Not only does price of food need to be taken into account, but staff needed to coordinate, prepare and serve the food also needs to be taken into consideration. Other options include having a kitchen facility available for use, or providing guests with a list of caterers in the area.

A final consideration drawn from the case studies is to make sure there is a full or part-time staff member devoted to maintenance and one devoted to office and administrative duties. While it is possible to have one person do both positions, the case studies we described all had at least two different people covering these positions. Most of the case studies also had at least one staff member living on-site. A staff member living on site is best equipped to handle maintenance and administrative problems quickly and efficiently.

Legal and Funding Structure

The Shire has three options to consider when deciding on legal and funding structure: for profit, nonprofit, and become part of the University. Advantages and disadvantages for each option are summarized below.

For Profit: If the Shire functioned as a for profit organization, it would have a CEO/President to organize and manage the staff. The positives of this funding structure are:

- It would allow the Shire autonomy.
- The Shire would be subject to less bureaucracy than if it were a part of the University.
- Restrictions on who could use the Shire would be at the discretion of the CEO and Board.
- The cost of health care and other benefits might be lower than in other alternatives.

Possible negatives of this funding structure include:

- The Shire would have little support from the University.
- The Shire would have to pay employment taxes, which nonprofits and the University are exempt from.
- A for profit structure might cause a conflict between the Shire's mission and goals because of the pressure to generate a profit.

Nonprofit: If the Shire functions as a non-profit, it would be run by an executive director, with oversight by a Board of Directors. The positives of the nonprofit are:

- It would allow the Shire autonomy.

- The Shire would be subject to less bureaucracy than if it were a part of the University.
- The Shire would have tax-exempt status.
- The cost of health care and other benefits might be lower than in other alternatives.

Possible negatives include:

- Most nonprofits face a constant need to fundraise.
- The Shire might have possible conflicts between the Shire's mission and its visitors, causing it to lose business.

University Department: If the Shire became a University department, it could become a part of AAA. It would have a similar management structure as other University departments.

Some positives of this alternative are:

- The Shire would be able to use University staff for administrative functions such as payroll.
- The Shire would be able to access existing University services, such as lawyers and insurance.

Some possible negatives include:

- The Shire would have little flexibility in terms of pay and benefits.
- It would be subject to the University's procedures, such as using University approved vendors.
- The Shire would need to compete with other University departments for funding.
- The cost of health care and other benefits might be higher than in other alternatives.

Figure 3-1: Summary of Case Study Facilities

Center and University Affiliation	Location	Distance from the University	Size of Site	Number of Buildings	Primary Users
Ashokan Field Campus State University of New York- New Paltz (7,600 students)	Foothills of the Catskill Mountains in upstate New York	30 miles from New Paltz	372 acres	12 buildings	K-12 school groups on day tours or 3-5 day programs Adult retreats and conferences (programs sponsored by outside groups & Ashokan)
Horn Field Campus Western Illinois University (13,000 students)	South of Macomb, Illinois	5 miles from Western Illinois University	92 acres	8 buildings	University day users University overnight groups Corporate retreats Family reunions
Lorado Taft Field Campus Northern Illinois University (22,000 students)	Oregon, Illinois	37 miles from Northern Illinois University	141 acres	15 buildings	K-12 school groups Conference groups University groups
Oregon Institute of Marine Biology University of Oregon (20,000 students)	Southern Oregon coast near Coos Bay	122 miles from UO	100 acres	23 buildings	University students Visiting researchers
Sitka Center for Art & Ecology (no university affiliation)	Central Oregon coast north of Lincoln City	Not affiliated with a university	0.65 acres	8 buildings	Artists and naturalists in residence Workshop instructors and participants
IslandWood (no university affiliation)	Bainbridge Island, Washington, near Seattle	Not affiliated with a university	255 acres	10 buildings	School Groups
Tilikum Center for Retreats & Outdoor Ministries George Fox University (3000 students)	Newburg, Oregon	8 miles from George Fox University	92 acres	5 buildings	Religious Groups School Groups

Figure 3-1: Summary of Case Study Facilities (cont.)

Retreat/Study Center	Meeting Spaces	Overnight Accomodations
Ashokan Field Campus State University of New York- New Paltz	Largest Space: 120 people Medium Space: 75 people 3 Smaller Spaces: 30 people Outdoor Pavilion	2 "bunkhouse" buildings with 120 bunk beds and shared bathrooms; 1 private cabin with three bedrooms accomodating six and two semi-private baths
Horn Field Campus Western Illinois University	One space: 55 people	3 cabins with 28 bunk beds and shared bathrooms
Lorado Taft Field Campus Northern Illinois University	Largest space: 130 people 5 Medium Spaces: 64-100 people 2 Smaller Spaces: 15-20 people	3 dormitories with 165 bunk beds and shared bathrooms 1 private room per dorm
Oregon Institute of Marine Biology University of Oregon	Largest Space: 100 people Medium Space: 80 people	Dorm building with 40 beds and shared bathroom 4 cottages with bathroom and two- three bedrooms each
Sitka Center for Art & Ecology	Largest space: 1200 sq ft 3 Medium spaces: 850 sq ft	Three apartments with individual kitchens and bathrooms for use by instructors and individuals in residency program only.
IslandWood	Largest Space: 150 people 2 Medium Spaces: 40 and 30 people	143 people in 3 lodges and one guest cottage all with private bath and mix of bunk, twin and queen size beds
Tilikum Center for Retreats & Outdoor Ministries George Fox University	Largest space: 60 people Medium Space 30 people	60 people in 18 semi-private rooms with private baths and twin beds. 7 platform tents sleep 56 in bunk beds

Figure 3-1: Summary of Case Study Facilities (cont.)

Retreat/Study Center	Meal Plan	Other Services Offered	Funding Model	Cost for Overnight Accomodation and 3 Meals Per Person	Day Use Meeting Space Rental Per Day
Ashokan Field Campus State University of New York- New Paltz	Overnight guests must use meal plan; daytime guests may bring their own food	Pillows and blankets provided and laundered in house Cleaning service option Small store on campus sells toiletries	Non-profit, self supporting	\$13 for University groups; \$18 for non univeristy groups, \$58 includes educational program	\$5.80/ person
Horn Field Campus Western Illinois University	Guests responsible for arranging catering or cooking for themselves in the kitchen	Cleaning services optional Linens may be rented Customized room set up Campfire wood sold	Programs are self-supporting Coordinator salary paid for by University	Horn does not provide food service; lodging is free for university groups, \$4 for other users	\$24/ room
Lorado Taft Field Campus Northern Illinois University	All guests must use meal plan	Linens may be rented	Highly subsidized by University	\$54 for school groups; \$30 for university students; \$45 for conference participants	\$14/ person
Oregon Institute of Marine Biology University of Oregon	Dorm residents must use meal plan; residents in cottages have kitchens and must cook for themselves during off season	Linens provided to those who forgot their own	Highly subsidized by University	\$30 - \$40	\$40- \$50/ room
Sitka Center for Art & Ecology	Residents and visiting instructors staying in the apartments cook in their own kitchens. Workshop participants must bring their own food for lunch.	Sitka sponsors a website to help conference participants find off-site housing	Nonprofit, funded through tuition, membership donations, and grants	Sitka does not provide meal service for program guests; lodging is free for guest resident artists	No information
IslandWood	All guests must use meal plan	Linens are provided with rooms	Nonprofit funded through membership, donations, grants	\$185/ room for non-profits	\$2595 for entire lodge
Tilikum Center for Retreats & Outdoor Ministries George Fox University	Those sleeping in the rooms must use the catered meal service; those staying in platform tents can bring their own food and grill (no kitchen facility)	Linens may be rented; for week long retreats, mid-week cleaning is provided	Revenues, grants, donations	\$70.5 for all groups; \$9.50 for platform tents (no food)	No information

Figure 3-1: Summary of Case Study Facilities (cont.)

Retreat/Study Center	Year round staff	Seasonal Staff
Ashokan Field Campus State University of New York- New Paltz	1.0 FTE: (1) director, (1) assistant director/program coordinator, (1) coordinator of special programs, (1) administrative secretary, (3) kitchen staff, (1) caretaker, (1) groundskeeper AS NEEDED: (2) cleaning staff.	During school year 1.0 FTE: (13) instructors, (7-8) additional kitchen staff at peak periods.
Horn Field Campus Western Illinois University	1.0 FTE: (1) program coordinator. 0.5 FTE: (1) maintenance worker. 0.25 FTE: (1) secretary.	Summer 1.0 FTE: (1) camp director, (2-6) camp staff. Summer .4 FTE: (1) maintenance worker. Summer variable FTE: (1) challenge course manager, (1) assistant manager. School Year .4-.5 FTE: (3-4) general staff.
Lorado Taft Field Campus Northern Illinois University	1.0 FTE: (1) director, (1) conference coordinator, (1) environmental education coordinator, (2) assistant coordinator, (1) secretary, (1) Food Service Administrator, (1) Building and Grounds Supervisor, (1) nurse, (4) cooks, (2) dishwashers, (5) maintenance worker 0.5 FTE (2) cooks, (2) maintenance workers	School Year 1.0 FTE: (8) environmental education teachers, as needed .5 FTE assitant program coordinators
Oregon Institute of Marine Biology University of Oregon	1.0 FTE: (1) office manager, (1) office specialist, (1) computers and stockroom, (1) maintenance coordinator, (1) trades maintenance worker I, (1) trades maintenance worker II, (1) custodian	Summer 1.0 FTE: (2) cooks School Year 0.5 FTE: (2) cooks
Sitka Center for Art & Ecology	1.0 FTE: (1) executive director, (1) communications and development director. 0.5 FTE: (3) office support personnel.	Summer 1.0 FTE: (1) intern
IslandWood	There are 56 full-time staff members	There are some seasonal part-time staff members that work when needed
Tilikum Center for Retreats & Outdoor Ministries George Fox University	1.0 FTE: (1) executive director, (1) program director, (1) retreat center director, (1) property manager (1) office manager, (1) retreat coordinator, (1) day camp manager, (1) food service director, (1) housekeeper, (1) property manager.	Seasonal 0.5 FTE: (4) housekeepers, (3) Cooks, (21) program teachers

Chapter 4

Analysis of Target User Groups

This chapter analyzes demand for use of meeting space and overnight facilities at the Shire based on the results of three studies pertaining to potential use of the Shire: (1) the Thomas Hacker Architects (T.H.A) study of departments within the School of Architecture & Allied Arts (AAA); (2) a survey administered by the Community Planning Workshop (CPW) to University of Oregon departments and centers; and (3) phone interviews administered by CPW to other groups and organizations that are involved with the arts, architecture, planning, and the environment.

Departments within AAA

In May 2003, Thomas Hacker Architects administered a questionnaire to departments within AAA (Art, Architecture, Art History, Arts and Administration, Historic Preservation, Landscape Architecture, Planning, Public Policy and Management, and External Relations and Development). The purpose of the questionnaire was to gauge AAA's offsite facilities need and determine which of the departments would potentially use the Shire. This section provides a summary of key findings from that questionnaire.

Although all the departments within AAA indicated that they would use the potential retreat and study center, the extent, type of use and time of year varied. Some departments expressed concern about the distance to the Shire from the University of Oregon.¹⁰

The Hacker survey divided types of use of the Shire into day, short, and long visits. Day visits would be for donor and alumni events and lectures. Short visits, lasting from two to seven days, would be for events such as retreats, meetings, workshops, independent study, and field trips. Long visits, lasting from one week to three months, would be for classes or artists in residences. (Chapter 5 summarizes the potential use of this user group.)

According to the Hacker study, the majority of long visits to the Shire are for unspecified times of the year. This makes estimating the number of AAA users for the Shire difficult because of the uncertainty in both the number of days in the visit and the number of people who might participate in the long visit.

Dates for potential use varies greatly as well, with the potential use of The Shire heaviest in September (student orientation) and in June, and the least demand in December.

¹⁰ Thomas Hacker Architects. The Shire Retreat and Study Center Program Confirmation, July 2005.

Most AAA departments desired the following amenities: a kitchen and/or meal service, overnight facilities (dormitory and private room), audio-visual equipment, computers with Internet access and GIS.

Campus Departments, Centers & Administrative Units

In July of 2005, the Community Planning Workshop sent a survey to 419 UO department heads, deans and center directors with a response rate of 12%. The purpose of the survey was to assess current off-campus facility use and potential demand for the Shire within the university. The survey included questions about the frequency and size of meetings that require off-campus space, how much user groups pay for the space, and what other facilities and amenities they need for their meetings. The full results of the survey, including the cover letter and survey instrument is included in Appendix A.

Current use of off-campus meeting space

The majority (56%) of respondents have at least one to two daylong off-campus retreats or meetings per year; whereas, only 29% have one to two overnight meetings or retreats. Only 6% have six or more overnight meetings or retreats per year. The majority (40%) of departments or centers hold off-campus retreats or meetings in September, followed by June. Departments schedule the least amount of retreats or meetings in the months of February and December.

About 40% of respondents travel less than 30 miles to reach off-campus meetings or retreats; whereas, about 30% of respondents travel over 200 miles to reach off-campus meetings/retreats.

Almost 30% of respondents pay \$31-\$60 per person per night and another 30% of respondents pay over \$150 per person per night for retreat or meeting space. We assume that the lower numbers reflect shared sleeping accommodations; whereas the higher numbers reflect single occupancy rooms.

Potential use of the Shire

To gauge future off-campus meeting and retreat demand, the respondents were provided with a short descriptive paragraph about the Shire. The description included the location, focus, and possible amenities for the proposed retreat and study center.

Of the 51 university departments, administrative units and centers that responded to the survey, 40% indicated that they would consider using the Shire, and 35% indicated they would “maybe” consider the Shire for an event. Figure 4-1 shows which departments responded to the survey, and if they would consider holding an event at the Shire.

Table 4.1: Departments or Centers that Would Consider Using the Shire

Academic Units:	Yes	No	Maybe
Music & Dance	x		
Geography	x		
PPPM			x
Center for Ecology & Evolutionary Biology			x
Teacher Education & Education Leadership departments		x	
Creative Writing Program		x	
Law School	x		
Materials Science Institute	x		
Chemistry			x
PPPM*			x
Center on Teaching & Learning			x
Law School*	x		
Anthropology		x	
Lundquist College of Business		x	
School of Journalism	x		
Germanic Languages & Literatures			x
Marriage & Family Therapy Program: College of Education	x		
Institute for the Development of Educational Achievement			x
Administrative Units:			
Office of Vice President for Research	x		
Student Affairs		x	
Business Affairs Office			x
University Housing	x		
Office of the Registrar		x	
Student Life Office			x
AAA Dean	x		
Academic Advising	x		
Vice President for Finance & Administration			x
Registrar's Office		x	
Student Orientation Programs	x		
Admissions			x
University Advancement	x		
Office of Development	x		
Vice President for Finance & Administration			x
UO Foundation	x		
President's Office	x		
Other:			
Purchasing		x	
Counseling & Testing	x		
Public Safety	x		
Alumni Association			x
Computing Center		x	
Printing Services		x	
Oregon Career Information System			x
Educational & Community Supports	x		
Oregon Quarterly		x	
Physical Activity & Recreation Services			x
Western Regional Resource Center	x		
First-Year Programs	x		
Career Center			x
Continuing Education			x
Institute of Theoretical Science		x	
Environmental Health & Safety			x

Source: Shire Feasibility Survey, CPW 2005;

Notes: *Indicates a duplication in response

Respondents indicated how their department or center might use the Shire. The most common potential use among respondents is retreat followed by conference. The respondents are not interested in using the Shire for field based classes or independent study groups.

Table 4.2: Types of events departments hold and whether they would consider using the Shire

Event	Yes	No	Maybe
Conference	6	8	22
Retreat (within dept.)	12	7	22
Field based class	0	22	2
Independent study groups	0	21	2
Donor and alumni events	4	16	7
Board meetings	2	19	7
Student orientation	1	19	6
One day meeting/class	1	11	14
Total	26	123	82

Source: Shire Feasibility Survey, CPW 2005

Amenities

The next question asked which amenities and services would be important to include at the Shire. The amenities that were considered most important include a large meeting room (93%), small meeting room/studio space (89%), and double rooms (81%). Those services most important include catering/meal service (92%), Internet access (92%), and video conferencing equipment (86%). The amenities that were considered that least important include outdoor classrooms (47%), outdoor amphitheatre (42%), and short-term living accommodations (43%).

Professional Organizations, Foundations and Non-Profits

To determine if groups beyond those at the University of Oregon would use the proposed Study and Retreat Center, CPW identified potential users outside the University of Oregon that are involved with the arts, architecture, planning, and the environment.

The purpose of the phone interviews was to identify the types of facilities these potential user groups currently use, whether they would consider using the proposed meeting facilities at The Shire, how much they currently pay for offsite facilities, and what types of facilities and amenities they would require at The Shire. Of the 46 groups identified, 29 agreed to be surveyed over the phone.

Of the 29 respondents, 20 used offsite locations for meetings and/or retreats. More than three quarters (80%) of the 20 respondents that use offsite facilities indicated they would consider using The Shire. Table 4.3 lists those groups who expressed interest in using The Shire.

Table 4.3: AAA Related Professional, Foundations and Nonprofit Groups Interested in The Shire

Interested Potential Users

Architecture Foundation of Oregon
Columbia Gorge Arts & Culture Council
Ford Family Foundation
Friends of the Columbia Gorge
Grantmaker of Oregon and Southwest Washington
Historic Preservation League of Oregon
Meyer Memorial Trust
Northern Pacific Chapter of International Interior Design Association
Oregon Arts Commission
Oregon American Society of Landscape Architects
Oregon Chapter of the American Institute of Architects, Portland
Oregon Nature Conservancy
Oregon Potters Association
Regional Arts & Culture Council
Spirit Mountain Community Fund
Washington American Society of Landscape Architects, Seattle

Source: Shire Feasibility Interviews, CPW 2005

The Shire could expect some demand for its use from groups outside the University of Oregon. According to CPW's cursory survey of potential users, the groups most interested in The Shire are those in the Portland Metro area and along the Columbia Gorge. For those groups unfamiliar with The Shire, once a description was read to them interest grew. Most of these organizations are accustomed to paying for offsite facilities especially if they included food and beverage service. Catering and/or kitchen service and modern, high-tech facilities were the pre-requisites most stressed during the interviews.

Conclusion

There is demand for meeting space and overnight facilities at The Shire. This finding, however, is tempered by the following factors:

- The type of facilities needed both in terms of capacity and amenities varies greatly among potential users. This implies that the more flexible the space the better.
- Among the two groups that identified the season of usage (AAA departments and campus wide departments, centers, and administrative units), early fall and summer were the most popular times, and winter was the least popular. However, there were several university departments which had year round need for offsite facilities especially for activities pertaining to students. This could indicate possible year around use of The Shire; however, the amount of use and the cost of operating the facility

in the winter may not justify keeping the facility open year round when other potential visitors are not eager to stay there..

- Most of the groups surveyed used off-campus facilities for groups of 11-30 people. The number of departments and organizations needing space for over 40 people was minimal suggesting that building a larger facility might not accommodate enough groups to make it worth the added costs.
- Similarities from the three user groups surveyed are found when looking at the amenities potential Shire users' request. For example, all three user groups identified the need for breakout or classrooms, catering service and/or kitchen access, and for modern technology (e.g., computers, AV equipment, and Internet access). Two of the three groups said that the ability to stay overnight was a necessity.
- The survey methods identified groups that might *potentially be interested* in using the Shire. Without getting a firm commitment from university departments, it is difficult to determine how much of that potential would translate into actual use.

In summary, most of the campus departments, centers and administrative units and professional organizations affiliated with AAA surveyed want a modern facility in a natural setting. How to accommodate modern technology, appropriate lodging facilities, and catering/meal service are issues that are addressed in the remainder of this report.

Chapter 5

Financial Feasibility

This chapter presents CPW's preliminary financial feasibility assessment of the proposed study and retreat center for the Shire. It answers three questions:

- How much demand exists for meeting space and overnight facilities at the Shire?
- How much are target user groups willing to pay for use of the Shire?
- What operational model is most appropriate?

Summary of Demand

Developing use estimates for the Shire is complicated by the fact that it is difficult to equate interest in the facility with actual use of the facility. The Hacker study, the UO survey and the interviews with other users generated data about interest among target groups. We found that there is some demand for meeting space and overnight facilities at the Shire from each of these groups; however, we feel that the estimates for AAA users were overly optimistic, especially for potential demand to hold classes lasting a full term at the Shire because of the added expense to students for living at the Shire. While holding classes at the Shire may happen, it seems unlikely to happen with the frequency reported in the Hacker study. Similarly, we only included use for other University departments that indicated they *would* use the Shire, omitting usage for departments that indicated they *might* use the Shire.

Using these assumptions, Table 5-1 shows estimated overnight use by UO campus user groups (AAA and other departments). The low estimate for overnight use is about 3,000 people per year, which is 21% occupancy for 40 beds. The high estimate is for about 5,300 overnight uses per year, which is 37% occupancy. Table 5-2 shows potential day use of the Shire by AAA users and other University of Oregon users. It does not show potential use by non-university users because few groups expressed a clear interest in using the Shire for overnight functions.

Table 5-1. Potential overnight use of the Shire for AAA user groups and all other campus users, number of person-nights

	Low	High
AAA based users	1,900	3,800
Other campus users	800	1,500
Total Visits	2,700	5,300

Source: Shire Feasibility Survey, CPW, August 2005.

Table 5.2: Potential day use of the Shire for AAA user groups and all other campus users, number of visitor days

	Low	High
AAA based users	300	500
Other campus users	300	400
Non-University users	15	30
Total Visits	615	930

Source: Shire Feasibility Study, CPW, October 2005.

Willingness to pay for use of the Shire

Having established that there is demand for use of the Shire, the next question is what user groups are willing to pay to use the Shire. Table 5-3 shows our estimates of the amounts that different user groups are willing to pay for use of the Shire.

In the survey of all departments, centers and administrative units, university user groups indicated that there is wide variation in what they pay for lodging and food. Respondents can be grouped into one of two groups, those willing to pay \$20 to \$60 per person per night for lodging and food and those willing to pay over \$90 person per night for lodging and food. We assume the respondents who pay more than \$90 are likely staying at hotels with private rooms and that respondents who pay \$20 to \$60 are likely staying in facilities with shared sleeping areas. If sleeping arrangements at the Shire are predominantly rooms with at least four people per room, the Shire is likely to attract University user groups who are willing to pay \$20 to \$60 per night. See Appendix A for detailed information about the survey results.

CPW estimated what off campus user groups are willing to pay based on what other facilities within or near to the Columbia River Gorge charge and what the facilities in our case studies charge.

For both groups we separated the amount they might be willing to pay with and without meals for overnight use. As indicated in the survey, university users might be willing to pay \$20/25 to \$60 per person per night with meals. The case studies suggest that non-university user groups might be willing to pay \$20 to \$60 without meals. When using state authorized per diem figures for Oregon, groups may be willing to pay \$35 to \$100 with meals.

Table 5-3: Estimates of what user groups are willing to pay, per person per night, for overnight accommodations

	Low	High
University users		
Without meals	\$10	\$40
Including meals	\$25	\$60
Non-University users		
Without meals	\$20	\$60
Including meals	\$35	\$100

Source: Shire Feasibility Study, CPW, October 2005.

Table 5-4 includes estimates of the amounts that user groups would be willing to pay for day use per person. Day use would include use of the meeting rooms at the Shire, which should be enough meeting space for 60 people. The amount that university user groups might be willing to pay is limited because meeting space rental is free on the Eugene and Portland campuses; however, some groups may be willing to pay for use of this specialized facility (\$100 to \$150 per day is consistent with rates for comparable facilities at the EMU; we assume \$120 for our analysis). Non-University user groups might be willing to pay \$180 to \$250 for use of the Shire's meeting rooms. These estimates do not include meal service.

Table 5-4: Estimates the amount that user groups might be willing to pay for use of the Shire's meeting rooms

	Low	High
University users	\$0	\$120
Non-University users	\$180	\$250

Source: Shire Feasibility Study, CPW, October 2005.

Operational Models

The previous section suggest that there is some level of demand for the Shire and that there are varying ranges that user groups are willing to pay for use of the Shire. Once demand had been established, CPW developed operational models that describe options for how the Shire might be run. These operational models attempt to balance services that user groups want with services can be offered at the Shire. They are based, in part, on what CPW learned from the cases studies. CPW assessed what has and has not worked for other university-based facilities and considered the implications in the context of the proposed study and retreat center at the Shire. CPW developed two operational models based on staffing and services: (1) low level of service (fewer staff, no meal service), and (2) high level of service (more staff, and on-site meal service).

Low Level of Service

The low level of service operational model would allow the Shire to provide basic day and overnight use of the facility. This model utilizes the equivalent of two full time staff (a full time program coordinator and part time maintenance workers, administrative assistant, and marketing assistant); and does not provide food service on site.

Table 5-5 shows a breakdown of the personnel services costs. This operational model assumes that the Shire will have a total staff of 2.0 FTE. One FTE is for the Shire coordinator or program director. In the case studies, we found that every facility had a program director. We assume that this person would live onsite at the Shire. The program director would fulfill several roles, including simple facility

maintenance, greeting and helping visitors, supervising other employees, and interfacing with the Shire Advisory Group.

The other FTE is divided by three positions, a maintenance worker, an administrative assistant, and a promotions/marketing assistant. The maintenance worker would be responsible for any larger scale maintenance that the Shire coordinator was unable to perform. The administrative assistant would assist the Shire coordinator with reservations and scheduling, accounting and financial management, and other administrative tasks. The promotions/marketing assistant would work to promote the Shire to groups both inside the university and other organizations. None of these staff people would need to live onsite; and only the maintenance person would need to be onsite with any frequency. The administrative assistant and promotions/marketing assistant could be located at the university. CPW used the average salary and benefits costs when estimating personnel costs.

Table 5-5: Estimate of personnel services costs for a low level of service

Personnel Services	FTE	Salary & Benefits	
		Low	High
Shire Coordinator (Director)	1.00	\$42,000	\$54,000
Maintenance Worker	0.25	\$6,900	\$9,900
Administrative Assistant	0.50	\$15,000	\$21,000
Promotion/Marketing Assistant	0.25	\$10,500	\$13,500
Total Cost		\$74,400	\$98,400
Total FTE	2.0		

Source: Shire Feasibility Study, CPW, October 2005.

Note: The range of salary and benefits is for a full-time employee. The total costs of personnel services assumes that all of the employees other than the Shire coordinator are part-time employees. The estimates for these positions were taken from www.salary.com.

Table 5-6 shows an estimate of annual operations and maintenance costs for a low level of service. The total estimated annual costs are approximately \$146,000. The majority of the costs (59%) are staff for personnel services.

Table 5-6: Estimate of annual operating and maintenance costs, low level of service

Category	Amount	Percent of Total
Personnel Services	\$ 86,400	59%
Supplies	\$3,000	2%
Food	\$0	0%
Utilities	\$20,000	14%
Maintenance	\$37,000	25%
Total Costs	\$ 146,400	100%

Source: Shire Feasibility Study, CPW, October 2005.

Facility maintenance and utilities account for the majority of remaining costs.¹¹ The estimate of the cost of utilities includes electricity and telephone service for a facility approximately 17,000 square feet in size. The cost of utilities will vary, depending on actual size, configuration, and energy efficiency of the facility, as well as the cost of electricity in Skamania County. Likewise, the cost of maintenance will vary as the facility ages and requires additional maintenance. The estimate for maintenance is based on maintenance costs in Portland and includes minor repairs, unscheduled maintenance, and renewal and replacement of equipment and fixtures.¹²

CPW did not include money for food service personnel or purchasing food in this operational model. In this operational model, user groups would have two choices for food service: prepare their own food in the facility's kitchen or use a local catering service.

High Level of Service

The high level of service operational model would allow the Shire to provide day and overnight use of the facility. The high level of service assumes that the Shire has more staff, provides more services, and has greater expenses than the low level of service. This model utilizes the equivalent of 4.5 full time staff (a full time program coordinator and five part time staff including an administrative assistant, maintenance worker, promotion/marketing assistant, cook and cook assistant); and provides food service on site.

Table 5-7 shows the annual personnel service costs for a high level of service at the Shire. This operational model includes at total FTE of 4.5. Like the low level of service, staff would include a Shire coordinator, an administrative assistant, a maintenance worker, and a promotion/marketing assistant. With the exception of the Shire Coordinator, these staff may be somewhat seasonal, working more around the times that the Shire has more visitors. This operational model also includes two staff for the kitchen and a janitor for cleaning the facility and providing linen service. These staff would be seasonal, working when the Shire is busy. This is similar to the number and type of employees at Horn Field Campus and Tilikum Center for Retreats and Outdoor Ministries, which are closest to the size of the Shire. However, these facilities have both more staff and capacity for visitors than the Shire.

¹¹ CPW did not include an estimate of the cost of insurance for the facility because it is unclear if the university or a non-profit will run the facility. Insurance rates will be different for each group. (The cost of University insurance is \$6.62 per 1,000 square feet. At this rate, insurance for the Shire would be approximately \$114 per year.)

¹² Whitestone Research, "The Whitestone Building Maintenance and Repair Cost Reference," 2002.

Table 5-7. Estimate of annual personnel services costs for a high level of service

Personnel Services	FTE	Salary & Benefits	
		Low	High
Shire Coordinator (Director)	1.00	\$48,000	\$60,000
Administrative Assistant	0.75	\$22,500	\$31,500
Maintenance Worker	0.75	\$20,700	\$29,700
Promotion/Marketing Assistant	0.50	\$21,000	\$27,000
Cook	0.50	\$15,000	\$21,000
Cook Assistant	0.50	\$10,200	\$16,200
Janitor	0.50	\$10,200	\$15,000
Total Cost		\$147,600	\$200,400
Total FTE	4.5		

Source: Shire Feasibility Study, CPW, October 2005.

Table 5-8 shows that the total estimated annual operating and maintenance cost of the high level of service is approximately \$312,000. Again, personnel services again make up the largest share of the costs (56%) for the high level of services.

Table 5-8. Estimate of annual operating and maintenance costs, high level of service

Category	Amount	Percent of Total
Personnel Services	\$ 174,000	56%
Supplies	\$5,000	2%
Food	\$76,000	24%
Utilities	\$20,000	6%
Maintenance	\$37,000	12%
Total Costs	\$ 312,000	100%

Source: Shire Feasibility Study, CPW, October 2005.

Utilities and maintenance costs account for approximately 16% of the total costs and will vary in a similar way as they do for the low level of service operational model.

One major difference between the low level of service and the high level of service operational models is that the high level of service model includes food service. Providing food service can be divided into two areas, buying the food, and paying someone to cook it. In this model we have included the cost of hiring the cooks in the personnel services category and the cost of food is separated out. The cost of food itself is an estimated \$76,000,¹³ assuming that the Shire would serve three meals a day for approximately 5,300 visitors per year. Most of these visitors would be staying at the Shire for two or more days. This

¹³ Our estimates for the cost of food are based on information from the University of Oregon's catering service. The cost of food is as follows: a continental breakfast is \$1.75, lunch is \$3.60, and dinner is \$9.00. These costs do not include staff costs for preparing and serving food.

accounts for about 20% of the total annual budget for the high level of service.

Comparison of potential use with the operational models

To determine financial feasibility, CPW analyzed three different scenarios based on the operational models: (1) low use and low expenses; (2) high use and low expenses; and (3) high use and high expenses (Table 5-9).

We made a series of assumptions to generate the revenue portion of this analysis.

Overnight Use

- We used the numbers presented in Table 5-1 to estimate the number of overnight visitors per year.
- For the low expense scenarios, we estimated that University user groups would pay \$25 per person per night. This is an average of the estimates that they would be willing to pay \$10 to \$40 per night for lodging without meals.
- For the high expense scenario, we estimated they would pay \$40 per person per night, including food. Again, this is an average of the estimate that they would be willing to pay \$20 to \$60 per night for food and lodging.
- We did not include an estimate for overnight use by non-University groups because in our interviews, few groups expressed an interest in using the Shire for overnight functions.

Day Use

- We used the numbers presented in Table 5-2 to estimate the number of day visitors per year for AAA and other campus user groups.
- We estimated that all campus user groups would not be charged a day use fee for the Shire in the low use scenario, but would be charged \$120 per day in the high use scenario.
- Based on our interviews with other potential users, we estimated that fifteen organizations would use the Shire on a day use basis. For the low use scenario, we assumed this would equate to fifteen days of use per year. For the high use scenario, we assumed this would equate to thirty days of use per year.
- We estimated that organizations would be willing to pay between \$180 to \$250 for a 60 person meeting room. Our estimate assumes that they pay \$215, which is the average of \$180 to \$250.

Table 5-9 shows that the high use and low expense scenario maybe financially feasible, assuming the high use estimate is not overly optimistic. The low use and low expenses estimate shows that lower use will result in a operational deficit of about \$71,000 per year; and the

high use and high expenses might yield a deficit of approximately \$90,000. The high use and high expense scenario has the largest operational deficit. The biggest difference between the high and low expense scenarios is the cost of food and food service staff.

Table 5-9. Comparison of operational costs and levels of usage

	Low use and low expenses	High use and low expenses	High use and high expenses
Revenues			
Overnight use			
A&AA based users	\$47,500	\$95,000	\$152,000
Other campus users	\$20,000	\$37,500	\$60,000
Day Use			
A&AA based users	\$0	\$1,920	\$1,920
Other campus users	\$0	\$1,560	\$1,560
Non-University users	\$3,225	\$6,450	\$6,450
Total Revenues	\$70,725	\$142,430	\$221,930
Expenses			
Personnel Services	\$86,400	\$86,400	\$174,000
Supplies	\$3,000	\$3,000	\$5,000
Food	\$0	\$0	\$76,000
Utilities	\$15,000	\$20,000	\$20,000
Maintenance	\$37,000	\$37,000	\$37,000
Total Expenses	\$141,400	\$146,400	\$312,000
Profit (Loss)	(\$70,675)	(\$3,970)	(\$90,070)

Source: Shire Feasibility Study, CPW, October 2005.

Another way to look at the financial feasibility is to determine total expenses and then calculate how much use the facility would need to break even. Table 5-10 presents the break even points for the low level and high level of service operational models.

Table 5-10. Break-even point for operational models

	Low Level of Service	High Level of Service
Total Expenses	\$146,400	\$312,000
Overnight use	\$137,500	\$304,000
Approximate number of visitors	5,500	7,600
Percent of Annual Capacity	38%	52%
Number of days per year	140 to 180	190 to 230
Cost per night	\$25	\$40
Day Use	\$9,930	\$9,930
Number of days	60	60
Cost per day	\$170	\$170

Conclusions

In summary, the purpose of this chapter was to answer the following questions.

- **How much demand exists for meeting space and overnight facilities at the Shire?** According to the Hacker study, the survey of university departments and centers and interviews with groups not affiliated with the university, there is demand for the Shire, but it is uncertain how that will translate into actual use. CPW estimates that under the current assumptions, the Shire can expect 20 – 40% overnight occupancy.
- **How much are target user groups willing to pay for use of the Shire?** Based on CPW's estimates, university groups may be willing to pay between \$20 - \$60 for one night of lodging and three meals and those groups not affiliated with the university may pay a higher rate between \$35 - \$100. There may be a market for higher cost and higher service facilities, such as Skamania Lodge, but the higher costs might discourage University user groups from using the Shire.

Day use rates are more disparate as university groups have access to free meeting rooms on the Eugene and Portland campuses, while other groups are more accustomed to paying for day meeting spaces.

- **What operational model is most appropriate?** According to our analysis of operational models, the low level of service is the most financially viable for the Shire. To be the most successful, the low level of service will need to be coupled with high overnight use.

The preliminary feasibility assessment presented in this chapter provides estimates of how a meeting and retreat center at the Shire would perform. Because we are modeling the performance of a proposed facility and because that modeling effort relies on a set of assumptions, there are inherent uncertainties with the analysis. Despite these uncertainties, the analysis presented in this chapter represents CPW's best assessment of how a facility might perform.

Moreover, our analysis is intentionally conservative. The risk to AAA of overestimating use or underestimating costs could create significant financial liabilities for the facility. While CPW's analysis is conservative, additional risk factors exist that the Shire Advisory Group needs to be aware of. These risk factors include:

- *Overestimate of use by user groups:* We commented that the use surveys generally identified interest and that there is a difference between groups expressing interest in a hypothetical facility, and the use of an actual facility. Design makes a big difference and will have a big impact on the attractiveness of the Shire to different user groups. The key risk here is overestimating

use based on expressed interest.

The case studies suggest that marketing is important. Use of the Shire may be less in the beginning but it may increase as it becomes better known and if it becomes a site for University classes for multiple days. Expanding the number of potential user groups can also increase the overall market base for the facility.

- *Peak Demand:* The surveys suggest periods where many groups would possible compete for the facility. The Walker-Macy study identified a carrying capacity at the Shire of about 60 persons. There is no compelling reason to exceed this figure. However, the Advisory Committee should be aware that the facility capacity will limit use and that a lot of demand will probably cluster around a few key periods each year.
- *Narrow range of potential users:* The mission of the Shire and the targeted user groups identified by Advisory Group members results in a relatively small number of potential external user groups within the primary market area. The small number creates limited demand for the facility. The risk here is creating an image the Shire is an exclusive facility that is only available to a small number of select users.
- *Proposed sleeping facilities:* The type of sleeping facilities may restrict interest by certain types of groups. CPW's research suggests that many types of users prefer single- or double-occupancy sleeping facilities. This is a key design issue for the Shire Advisory Group.

Chapter 6

Conclusions and Considerations

This chapter summarizes CPW's conclusions regarding the feasibility of the proposed retreat and study center at the Shire. It also presents a set of considerations with respect to the design, operation, and maintenance of the center.

Conclusions

The purpose of this report is to assess whether the proposed study and retreat center at the Shire, as presently conceived, is financially feasible. To answer this question we assessed demand for the facility from various target user groups, which allowed us to estimate revenues and expenses for two operational models. At the most fundamental level, costs and revenues are the key determinants of financial feasibility. Both these variables, however, are highly dependent on issues related to facility design, mission, marketing, and operations. Assumptions with respect to each of these variables will in turn, affect costs and revenues. The key assumptions underlying CPW's analysis include:

- The facilities will be approximately 17,000 square feet, will have overnight accommodations for approximately 40 people, and will have a maximum meeting capacity for about 60 people.
- The mission of the facility is narrowly focused on education around architecture and allied arts.
- The mission, combined with site use restrictions, narrows the range of potential user groups to UO programs, and organizations that are related to architecture and allied arts education and professional organizations.
- AAA desires the facility to operate at least at a break-even level on operations and maintenance costs. Capital costs are external to the feasibility assessment.

Based on CPW's research, our preliminary feasibility analysis suggests that **given the current assumptions of needed staff levels and low use, the Shire is not financially feasible.** To determine financial feasibility, CPW modeled three different scenarios: (1) low use and low expenses; (2) high use and low expenses; and (3) high use and high expenses. Given the assumptions used in the model, CPW's assessment is that the most likely scenario will result in an annual deficit of approximately \$70,000. Under more generous assumptions (high use and low expenses) the Shire *may* break even.

That said, the Shire could become financially feasible if use for the Shire can be increased and/or if the number of staff needed to produce

the desired level of service can be made more efficient. We think it is much easier to expand the base of potential users than to achieve efficiencies. The remainder of this section provides more detail on how we came to our assessment.

- **The level of service offered at the Shire has direct implications to types of user groups attracted.** The level of service that is ultimately settled on will have a big impact on the types of groups that are attracted to the Shire, and perhaps more importantly, on fees. Staff costs must be balanced with desired level of service and requirements of target user groups. CPW identified comparable facilities that had as few as two full time staff members.
- **Demand for the Shire is relatively low among target user groups.** CPW's demand assessment is based on the Hacker study, the survey of University departments, and interviews with user groups not associated with the University. It is clear that departments within the University, especially those within AAA, are interested in using the Shire. A key challenge to the proposed facility is in turning that interest into actual use.

CPW's high-range estimates of overnight use of the Shire indicate that university user groups would use the Shire overnight at about one-third capacity. Likewise, non-University user groups are interested in using the Shire but most of their interest is for day use.

- **A considerable amount of the demand appears to be during two peak periods: June and September.** The data gathered from campus user groups suggests a strong preference for these periods.
- **The feasibility of the facility is predicated on a substantial amount of overnight use.** CPW's research suggests that comparable meeting facilities are charging between \$180 and \$250 for use of meeting space. If a substantial amount of use turns out to be day use, the facility will require significant subsidies.
- **Potential user groups may not be willing to pay enough to support operations and maintenance at the Shire.** The amount that University user groups are willing to pay for overnight accommodations appears to be lower than the amount that the Shire would need to charge, especially at lower use levels. It is possible that some campus user groups that are interested in using the Shire may not be willing to pay to use it. This is due, in part, to the availability of free or inexpensive meeting space on campus. Non-university user groups were often more interested in day use of the Shire, which brings in less revenue than overnight use but may preclude overnight use by other user groups.

- **The railroad presents a major obstacle to developing the Shire.** Forty-five trains use the railroad tracks each day. The trains operate twenty-four hours per day, running at about 50 miles per hour. The amount of noise generated by the trains presents a significant challenge to developing the Shire, especially the upper section of the site. The noise from the trains may be a nuisance for guests sleeping and instruction, thus limiting actual use. In addition, the frequency of train passage presents safety issues for people and vehicles crossing the tracks to access the lower portions of the site.

Key Considerations

Although CPW concluded that the Shire is not financially feasible based on the current assumptions, the Shire could be potentially be made feasible through some changes in the operations and design of the facility. Key considerations include:

Operations

Staffing

In Chapter 5, we presented two models of service, which focused on the levels of staffing.

- The low service model has two full time equivalent (FTE) staff. This includes one full time position, the Shire coordinator. It also includes a number of part-time staff members, including: a maintenance worker, an administrative assistant, and a promotions and marketing assistant.
- The high service model has four and one-half FTE staff. This includes one full time position, the Shire coordinator. It also includes a number of part-time staff members, including: a maintenance worker, an administrative assistant, a promotions and marketing assistant, cook, cook assistant, and janitor.

The amount of staffing directly relates to the level of service that the Shire can provide its guests. Staffing costs are the largest percentage of total operating costs and must be considered strategically. If the Shire has too few staff and an extremely low level of service, the operating budget will be smaller; however, the facility may not be attractive for users. On the other hand, high levels of service may necessitate that the Shire charge more than the target populations can pay.

Target user groups

The direction provided by staff and the Shire Advisory Group identified a relatively narrow range of target user groups for the Shire. In this study, we focused on AAA, other University groups, and nonprofits related to AAA disciplines. We found a limited amount of demand for use of the Shire among these user groups. The following is a summary of difficulties related to these user groups.

- **University users may be unwilling or unable to pay enough to cover their costs at the Shire.** This statement is based on the assumption that AAA desires to operate the facility at a break-even level. University user groups are likely to be unwilling to pay for day use of the Shire because meeting space is freely available on campus. In addition, the cost of holding multi-day or multi-week classes at the Shire may be higher than students and/or departments are willing to pay. This creates a conflict between the desire to have University user groups use the Shire and the need to generate sufficient revenues to support operations and maintenance at the Shire.
- **The distance may be an obstacle for University user groups to use the Shire.** The survey showed that the majority of off-campus meetings were located within 100 miles of campus. The Shire's distance from campus may discourage use by University users. Four of the five case studies affiliated with a university were located within 40 miles of the parent school. According to the director of Ashokan, the 45-minute drive from State University of New York at New Paltz to the facility reduces the number of student visitors/guests. The Oregon Institute of Marine Biology is located 122 miles from the UO. It mainly caters to students and professors specifically interested in marine biology and does not attract university groups needing meeting or retreat space.
- **Portland based groups are more interested in using the Shire for day use rather than overnight use.** Most of the groups that we contacted who are interested in using the Shire are interested in using it for day use, rather than overnight use. We found that day use generates a limited amount of income. The income from overnight use is greater and is important to ensuring the viability of retreat and study centers.
- **Consider expanding the range of target user groups.** The facilities in our case studies have a broad range of potential user groups and several of the facilities are open to any interested user groups. This gives the facility a larger pool of potential users, helping to operate closer to capacity, which is especially important during off-peak seasons. Some of the user groups that these facilities work to attract include:
 - ◆ School and youth groups, which generate substantial revenue for the facilities. However, school and youth groups require more resources, such as the need for more staffing, recreation options, programming and coordination, and child friendly accommodations, such as bunk beds.

- ◆ Community groups who are interested in the focus of the facility. For example, IslandWood gives mission-related nonprofits priority (after student groups).
- ◆ Any user group interested in using the facility. Several of the facilities in our case studies did not limit use of their facilities to any particular user group. For instance, Ashokan Field Campus allows any group to use their facilities, so long as they do not pose a hazard to the facility or have a mission that conflicts with Ashokan's purpose.

Programs

Several of the facilities in our case studies offered programming, especially for youth groups and community groups. The programs ranged from classes available for college credit, to recreational activities such as swimming or boating. The advantage of programming is that it helps attract desired user groups. The disadvantages are that they create additional costs and burden on staff time.

The Shire has a number of possibilities related to programming, including (but not limited to) the following.

- Offer university classes at the Shire for regular University of Oregon students. This will increase the number of people staying at the Shire and may help the Shire attract guests during slow times of the year. The problem with this option is that the Shire is located far enough from the University that students would have to stay at the Shire. This might make classes too expensive for some students or may not fit into their academic program. However, the Shire could offer a range of class opportunities ranging from one day to weekend classes.
- Offer art or nature related programs/classes to the public. The classes could take advantage of the Shire's unique attributes to attract people from across the region.
- Offer programs, consistent with the mission of the Shire, geared at youth groups. This will necessitate hiring additional staff to run the programs. Some recreational activities might be needed, such as arts and crafts programs.

Scheduling

The manner that the facility is scheduled, directly relates to its financial success. Although several of the facilities in our case studies give priority to specific groups for reservations, the majority manage their reservations on a first come first serve basis. This helps the facilities accommodate as many groups as possible through the year.

There are a number of issue to consider in creating a scheduling priority system, including: who gets priority, how is priority assigned, are specific dates or chunks of time held opened for the group with greater priority, are certain groups given an early opportunity to

schedule the facility, and what is the policy for resolving conflicts in scheduling priority.

Seasons of Operation

The Hacker study and the CPW survey of university deans, departments, and centers indicate that there is little interest in using the Shire during the winter. Several of the facilities CPW reviewed address the problem by closing down during the winter months. We anticipate the Shire experiencing the same low level of demand in winter. However, winter term may be an ideal time to run a long studio on the site.

Services

If the Shire includes overnight facilities, it will have to address the need for linen service and housekeeping.

- Linen service is generally handled in one of two ways. One option is to charge guests a daily fee for linen service. The other option is to require that guests bring their own linens. If the Shire offers linen service, it will have to determine whether the facilities will be provided on-site.
- Housekeeping can also be handled several ways: have each room cleaned daily, have each room cleaned at the conclusion of the guest's stay, provide limited housekeeping for long-term guests, or require guests to do their own housekeeping.

The other service that may be in demand at the Shire is technical assistance for the computer and audio-visual equipment. There are several ways to handle this issue: have University provide technical support or have a local contractor available for technical support.

Food Service

Whether to provide food service is one of the most fundamental operational decisions the Advisory Group faces. This decision will have potentially big impacts on the type and amount of use.

The service with the highest demand and highest cost is food service. Most of the facilities in the case studies offer some kind of food service to their guests. However, there are some major considerations when thinking about providing food service. First, it is costly, especially in terms of staffing (about 30 – 40% of total cost of providing food). Secondly, when the facility is not in use, there is no demand for food service. Even when there is no demand for food service, kitchen staff will still need to be paid. This can be mitigated (but not entirely eliminated) by hiring kitchen staff to work part-time, on call, or seasonally, which may create issues of staff commitment and continuity.

Facilities in our cases study have addressed these issues in two ways.

- One way is to make meal service an indivisible cost included with lodging. This forces guests to use the meal service and ensures that they pay the amount necessary to cover the costs associated

with providing meal service. Ashokan and Lorado Taft require that overnight guests use their meal service.

- Another way to address food service is to provide no food service but provide alternatives, such as local catering or the use of kitchen facilities to prepare food. This removes the responsibility for providing food service but gives visitors alternatives for getting meals. For example, Horn provides groups with a list of local catering service and allows guests to use the kitchen facilities to prepare their own food.

Design

In conducting our case studies, we learned about some design elements that can affect financial feasibility.

Lodging

The type and configuration of the lodging facilities is an important design component. According to the Hacker study, the current proposal for short-term lodging at the Shire is predominantly dormitory style with 4-10 beds per room. The double occupancy rooms only would consist of approximately 13% of the total living space.

Our case studies indicate that there is more preference for private rooms, especially among adults. For example, Ashokan is considering building more private rooms because the lodging at Ashokan is dormitory style. They expect to increase their bookings by building private rooms.

In addition, our case studies indicate that it is necessary to have at least one bathroom per building. And that having a bathroom for each sleeping room is an advantage.

Facility Amenities

There are certain amenities that the Shire should have, regardless of the primary user groups. These include:

- Computers and printers available for use by guests
- Internet service, including a wireless network for the facility
- Audio-visual equipment, such as a projector and screen in each meeting room
- Teleconferencing equipment, such as a speaker phone

Some amenities are necessary to serve specific user groups. For example, if the Shire is specifically serving art and architecture students, it may also be important to provide the guests with access to studio space, equipment, and selected supplies.

In conclusion, the proposed study and retreat center at the Shire could be a fantastic resource for the University of Oregon and the Pacific Northwest Region. The project, however, as presently conceived appears to pose considerable financial risk. If the project moves forward, the Advisory Committee should explore creative ways to increase use while

maintaining minimal, yet sufficient, staffing levels. Options could include phasing the development by beginning with a day-use pavilion; developing special interest programs to attract users to the site; and a long-term marketing strategy.

Appendix A

Survey of UO Deans, Directors, and Department Heads

This chapter provides a summary of the Shire Feasibility Survey sent to UO deans, center directors, and department heads. The purpose of the survey is to assess current off-campus facility use and potential demand for the Shire among campus user groups. The survey includes data about the frequency and size of meetings that require off-campus space, how much user groups pay for the space, what other facilities and amenities they need for their meetings, and their interest in the Shire.

Methodology

Through the campus distribution system, CPW mailed surveys to the university-generated list of Deans, Department Heads, and Directors (419 total). CPW received 52 responses, which equates to a 12% response rate. The cover letter and survey instrument are attached at the end of the appendix.

Key Findings

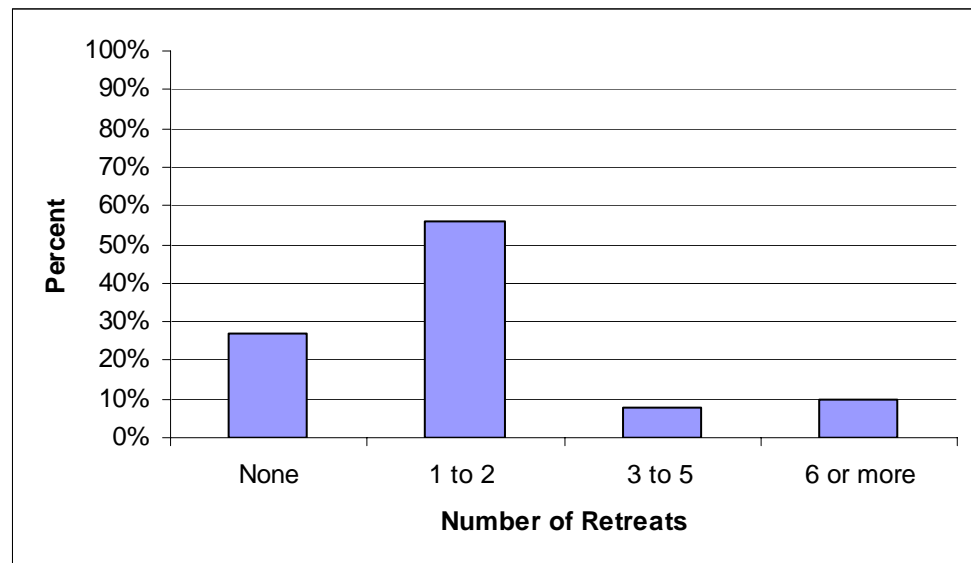
- Over half of the respondents have 1 to 2 daylong retreats or meetings per year, however, only 29% have 1-2 overnight meetings or retreat. Most meetings or retreats are held in September, followed by June.
- Almost 30% of respondents pay \$31-\$60 per person per night and another 30% of respondents pay over \$150 per person per night for retreat or meeting space. We assume that the lower numbers reflect shared sleeping accommodations; whereas the higher numbers reflect single occupancy rooms.
- About 40% of respondents travel less than 30 miles to reach off-campus meetings or retreats, while about 30% of respondents travel over 200 miles to reach off-campus meetings/retreats.
- Approximately 75% of the respondents indicated that they “would consider” or “maybe consider” using the Shire. The most common reasons stated by respondents for potentially using the Shire are for department retreats and conferences. The most popular times to hold events at the facility are fall and spring.
- Respondents expressed interest in staying at the Shire for a range of one to four days depending on the type of meeting. The median number of days respondents expect to spend at the Shire for a conference is two, for a field-based class is three, and for a retreat is one and a half. The median for donor events, board meetings, student orientation and meetings is one day.

- Respondents indicated that large and small meeting spaces, double rooms, catering/meal service, Internet access, and video conferencing equipment are all important amenities and services to include at the Shire. There was minimal interest for short-term living accommodations and an outdoor amphitheatre or classroom.

Current use of off-campus facilities

The first survey question asked how many off-campus daylong meetings or retreats the department or center organizes each year. Figure A-1 shows that the majority (56%) of respondents have at least 1 to 2 off-campus retreats or meetings per year. Less than one-third (27%) of respondents have no daylong off-campus retreats or meetings per year.

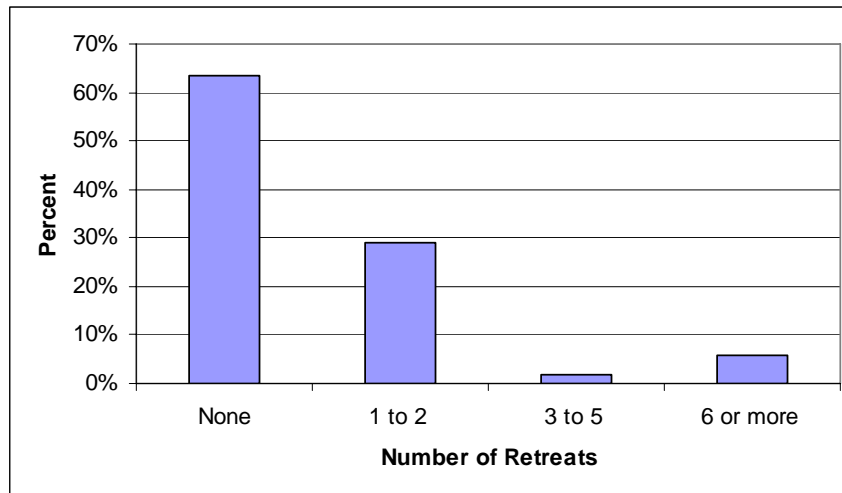
Figure A-1: Number of Daylong Off-Campus Meetings or Retreats Per Year



Source: Shire Feasibility Survey, CPW 2005

The next question asked how many overnight meetings the department or center organizes each year. Figure A-2 shows that the majority (64%) of the respondents have no overnight retreats or meetings per year. However, 29% of respondents have 1-2 meetings per year and 6% have 6 or more overnight meetings or retreats per year.

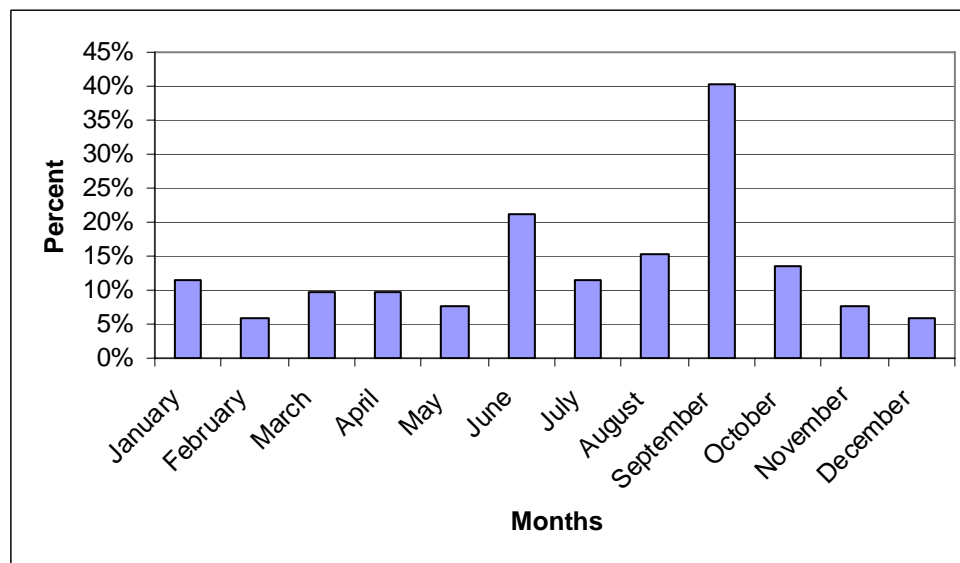
Figure A-2: Number of Overnight Meetings or Retreats Per Year



Source: Shire Feasibility Survey, CPW 2005

The third question asked about which months departments hold off-campus meetings or retreats (daylong or overnight). Figure A-3 shows that the majority (40%) of departments or centers hold off-campus retreats or meetings in September. Departments schedule the least amount of retreats or meetings in the months of February and December.

Figure A-3: Months that Departments or Centers have Off-Campus Retreats or Meetings



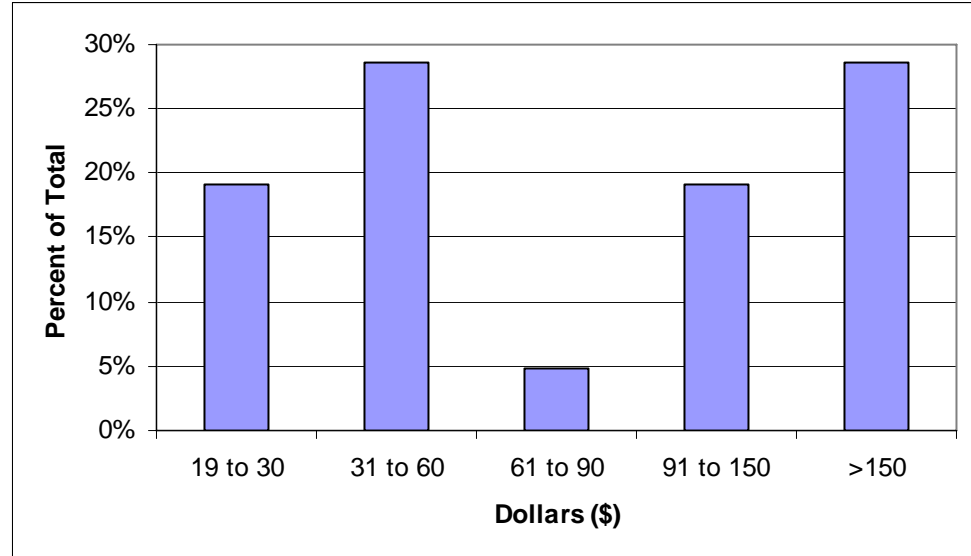
Source: Shire Feasibility Survey, CPW 2005

Note: The percentages add to more than 100% because many departments have retreats/meetings more than once a year.

The following question asked how much the department or center pays for space, food, and lodging per person per night. The responses for the amount paid ranged from \$19-\$150. Figure A-4 shows that 29% of

respondents spent \$31-\$60 dollars on food, lodging, and space, and the same percent of respondents spent over \$150 on food, lodging and space per person, per night.

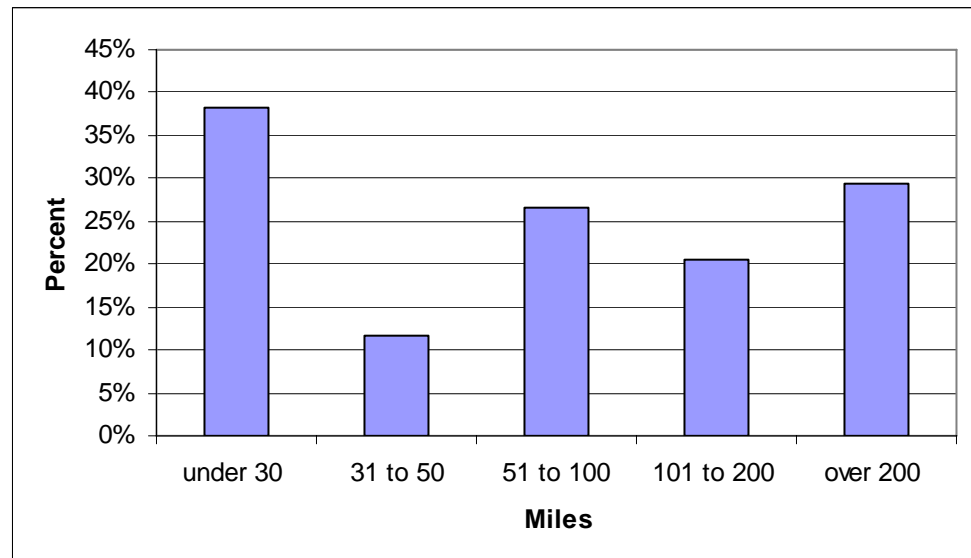
Figure A-4: Amount Paid for Food, Lodging and Space per Person per Night



Source: Shire Feasibility Survey, CPW 2005

The last question about current off-campus retreat or meeting center use asked how far departments or centers travel, on average, to reach off-campus meetings or retreats. Figure A-5 shows responses range from under 30 miles (38%) to over 200 miles (29%).

Figure A-5: Average Distance Traveled to Off-Campus Retreats



Source: Shire Feasibility Survey, CPW 2005

Potential use of the Shire

To help gauge demand for the Shire, the survey included a short descriptive paragraph about the Shire. The description included the location, focus, and possible amenities for the proposed retreat and study center. Of the fifty-two university departments or centers that responded to the survey, 40% indicated that they would consider holding an event at the Shire and 30% indicated that they “maybe” would consider holding an event at the facility (Table A-1).

Table A-1: Departments or Centers that would Consider Using the Shire

Academic Units:	Yes	No	Maybe
Music & Dance	x		
Geography	x		
PPPM			x
Center for Ecology & Evolutionary Biology			x
Teacher Education & Education Leadership departments		x	
Creative Writing Program		x	
Law School	x		
Materials Science Institute	x		
Chemistry			x
PPPM*			x
Center on Teaching & Learning			x
Law School*	x		
Anthropology		x	
Lundquist College of Business		x	
School of Journalism	x		
Germanic Languages & Literatures			x
Marriage & Family Therapy Program: College of Education	x		
Institute for the Development of Educational Achievement			x
Administrative Units:			
Office of Vice President for Research	x		
Student Affairs		x	
Business Affairs Office			x
University Housing	x		
Office of the Registrar		x	
Student Life Office			x
AAA Dean	x		
Academic Advising	x		
Vice President for Finance & Administration			x
Registrar's Office		x	
Student Orientation Programs	x		
Admissions			x
University Advancement	x		
Office of Development	x		
Vice President for Finance & Administration			x
UO Foundation	x		
President's Office	x		
Other:			
Purchasing		x	
Counseling & Testing	x		
Public Safety	x		
Alumni Association			x
Computing Center		x	
Printing Services		x	
Oregon Career Information System			x
Educational & Community Supports	x		
Oregon Quarterly		x	
Physical Activity & Recreation Services			x
Western Regional Resource Center	x		
First-Year Programs	x		
Career Center			x
Continuing Education			x
Institute of Theoretical Science		x	
Environmental Health & Safety			x

*Departments have more than one program; Source: Shire Feasibility Survey, CPW 2005

Respondents indicated how their department or center might use the Shire. The most common potential use among respondents is retreat followed by conference (Table A-2). The respondents are not interested in using the Shire for field based classes or independent study groups.

Table A-2: Types of events departments hold and whether they would consider using the Shire

Event	Yes	No	Maybe
Conference	6	8	22
Retreat (within dept.)	12	7	22
Field based class	0	22	2
Independent study groups	0	21	2
Donor and alumni events	4	16	7
Board meetings	2	19	7
Student orientation	1	19	6
One day meeting/class	1	11	14
Total	26	123	82

Source: Shire Feasibility Survey, CPW 2005

Another question asked during what seasons departments or centers would use the proposed retreat and study center. Table A-3 shows that for conferences and retreats, the fall and spring are the most popular. The most popular events in the summer are donor and alumni events.

Table A-3: Seasonal Use of the Shire by Event

Event	Fall %	Winter %	Spring %	Summer %
Conference	29%	15%	32%	24%
Retreat	35%	9%	29%	26%
Field Based Class	0	0%	0	0%
Independent Study Group	0	0%	0	0%
Donor and alumni events	27%	18%	18%	36%
Board meetings	18%	18%	36%	27%
Student orientation	50%	0%	17%	33%
One day meeting/class	30%	22%	26%	22%

Source: Shire Feasibility Survey, CPW 2005

Another question asked how long departments or centers would stay at the Shire. Respondents marked anywhere from 1 to 4 days; however, Table A-4 shows that a one-day stay is the most common response. However, respondents interested in conferences would stay 2 days, and those interested in field base classes would stay 3 days.

Table A-4: Length of Stay at the Shire

Event	Range (Days)	Median
Conference	1 to 4	2
Retreat (within dept.)	1 to 4	1.5
Field based class	2 to 4	3
Independent study groups	0	0
Donor and alumni events	1 to 2	1
Board meetings	1 to 2	1
Student orientation	1 to 2	1
One day meeting/class	1	1

Source: Shire Feasibility Survey, CPW 2005

Amenities and Services

The next question asked which amenities and services would be important to include at the Shire. The amenities that were considered most important (“very important” + “important”) include a large meeting room (93%), small meeting room/studio space (89%), and double rooms (81%). Those services most important (“very important” + “important”) include catering/meal service (92%), internet access (92%), and video conferencing equipment (86%). The amenities that were considered that least important (“very unimportant” + “important”) include outdoor classrooms (47%), outdoor amphitheatre (42%), and short-term living accommodations (43%).

Table A-5: Importance of Shire Amenities

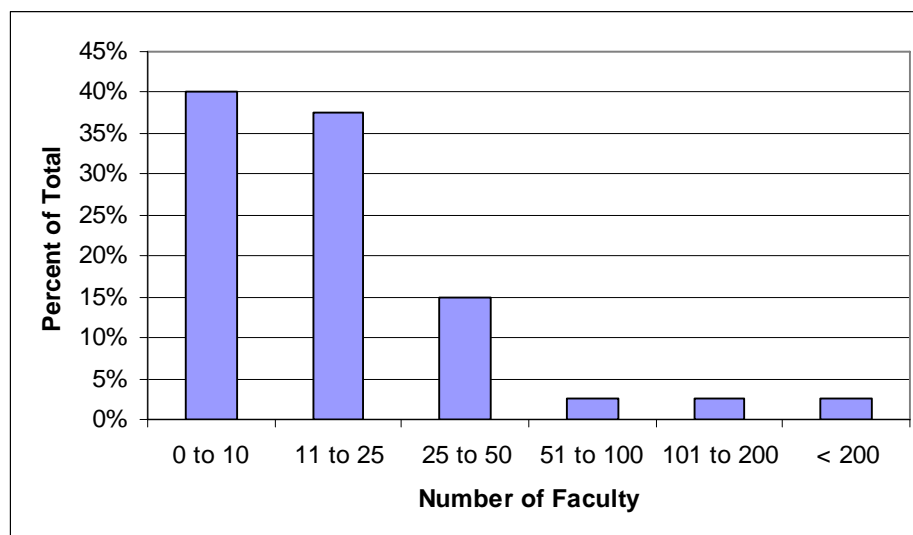
Amenity	Very Important		Neither Important Nor Unimportant		Very Unimportant		Don't Know
	Important	Important	Unimportant	Unimportant	Unimportant	Unimportant	
Meeting Spaces							
Large Meeting Room/Dining Room (40 – 60 capacity)	78%	13%	5%	-	3%	3%	
Outdoor Eating Area	11%	24%	51%	10%	3%	-	
Small Meeting/Studio Space (15 – 20 capacity)	47%	42%	11%	-	-	-	
Outdoor Classroom	-	6%	47%	36%	11%	-	
Outdoor Amphitheatre	-	3%	56%	31%	11%	-	
Lodging							
Group Accommodations (4 – 10 per room)	8%	33%	28%	14%	11%	6%	
Double Rooms	39%	42%	6%	3%	3%	8%	
Short-term Living Accommodations	-	6%	38%	34%	9%	13%	
Other Facilities							
Small Library	3%	9%	56%	21%	12%	-	
Work Room with Sinks	6%	18%	38%	21%	18%	-	
Kitchen	51%	23%	14%	9%	3%	-	
Services							
On-site Caretaker	22%	42%	14%	6%	3%	14%	
Catering/Meal Service	74%	18%	5%	-	-	-	
Housekeeping	36%	42%	8%	8%	-	6%	
Laundry	12%	15%	32%	29%	3%	9%	
Internet Access	76%	16%	3%	3%	3%	-	
Video Conferencing Equipment	70%	16%	5%	5%	3%	-	

Source: Shire Feasibility Survey, CPW 2005

Characteristics of Respondents

Figure A-6 shows the number of faculty members that reside at the department or center. The majority of respondents have less than 25 faculty members at their departments or centers.

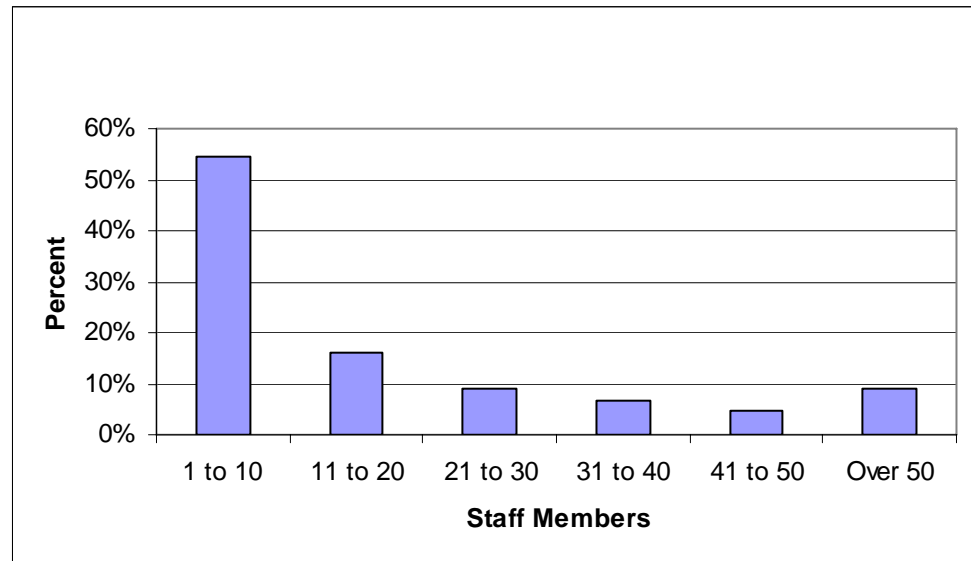
Figure A-6: Number of Faculty at Each Department or Center



Source: Shire Feasibility Survey, CPW 2005

Figure A-7 shows the number of staff employed at the department or center. The number of staff members at each department or center ranges from 1-700. The majority of respondents (55%) have 1-10 staff members employed at their department or center.

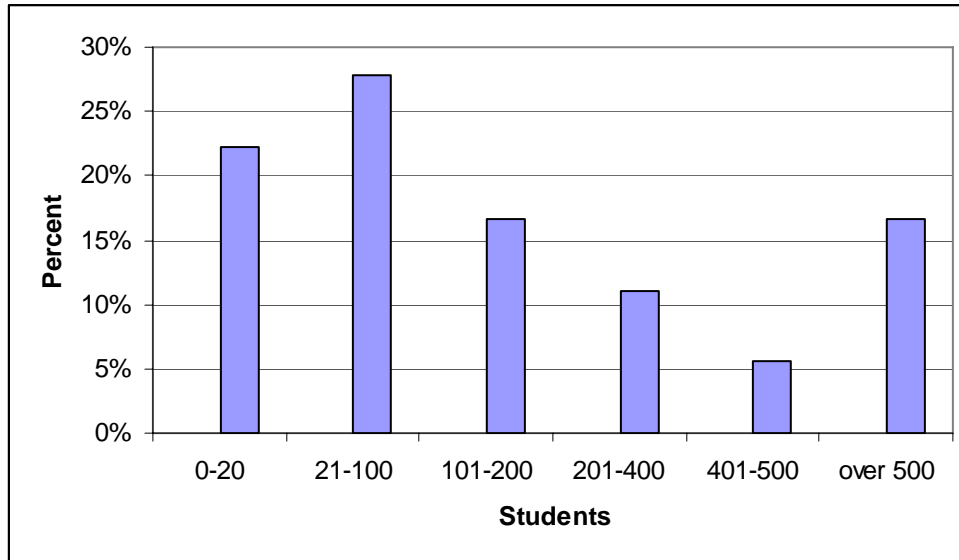
Figure A-7: Number of Staff Employed at Each Department or Center



Source: Shire Feasibility Survey, CPW 2005

There were 18 academic units that responded to the survey. The number of students at each department or center ranges from 0 to over 500. The largest department has 1,400 students. The majority of academic units have either 0-20 (22%) or 21-100 (28%) students. Seventeen percent of the departments or centers have over 500 students.

Figure A-8: Number of Students at Academic Units



Source: Shire Feasibility Survey, CPW 2005

August 2005

TO: Deans, Directors, and Department Heads
FROM: Rob Thallon, Associate Dean, Administration
RE: The Shire Retreat and Study Center User Survey

The School of Architecture and Allied Arts (A&AA) is investigating the possibility of developing a retreat and study center at The Shire, a 75-acre property in the scenic Columbia River Gorge that the school received as a donation in 1995. As A&AA investigates the feasibility of building the facility, we are gathering input from university faculty and staff about the current and potential uses of off-campus retreats, curriculum offerings, and meeting spaces. Potential accommodations at The Shire include a great room with a capacity to seat 40 to 60 people, a small library, studios, classrooms, kitchen facilities, and sleeping quarters for 40 people.

The Shire: John Yeon Center for Landscape Studies was a gift to the School of Architecture and Allied Arts by the trustees of the estate of John Yeon, a Portland designer, art collector, and conservationist. It is located at the heart of the Columbia River Gorge, directly across from Multnomah Falls in Skamania County, Washington. The Shire is a carefully designed landscape with a sculpted lawn, a series of meadows, wetlands, vista points, river bays, and walking paths. The school has accepted the gift with the commitment to preserve the site, and to offer educational opportunities for students and faculty who are studying design, art, planning, environmental issues, community development, landscape architecture, and historic preservation among other topics. The proposed study center is being evaluated for its potential use by campus and non-campus users, its ability to generate rental or tuition revenues, and the suitability of accommodations to host small conferences or retreats.

The school has engaged the UO's Community Planning Workshop to conduct this evaluation. The purpose of this short survey is to gather information about departmental off-campus conference and meeting use. The results from this survey will be used in a feasibility report for the proposed retreat and study center at the Shire. **Please return the survey in the enclosed envelope via campus mail by August 12th.**

If you have questions about the survey or wish to discuss this further, please contact Bob Parker, 346-3801 at the Community Planning Workshop.

Thank you in advance for your assistance.

Robert Thallon
Associate Dean, Administration
School of Architecture and Allied Arts

Shire Feasibility Survey

Survey Instructions: The person who is most familiar with off-campus meeting decisions should complete this survey. Please return it via campus mail to the Community Planning Workshop, in the enclosed envelope by **August 12th**.

If you have any questions regarding this survey, please contact Bob Parker, Community Planning Workshop Director at 6-3801.

First, we would like to ask you some questions about off-campus meetings/retreats your department or center organizes during the year.

Q-1 How many off-campus **daylong** meetings or retreats does your department or center organize each year?

- None
- 1 to 2 times per year
- 3 to 5 times per year
- 6 or more times per year

Q-2 How many off-campus **overnight** meetings or retreats does your department or center organize each year?

- None
- 1 to 2 times per year
- 3 to 5 times per year
- 6 or more times per year

————— If you answered “None” to Questions 1 and 2, please skip to Question 6. —————

Q-3 What months does your department or center hold off-campus meetings or retreats? (Check all that apply.)

- | | |
|-----------------------------------|------------------------------------|
| <input type="checkbox"/> January | <input type="checkbox"/> July |
| <input type="checkbox"/> February | <input type="checkbox"/> August |
| <input type="checkbox"/> March | <input type="checkbox"/> September |
| <input type="checkbox"/> April | <input type="checkbox"/> October |
| <input type="checkbox"/> May | <input type="checkbox"/> November |
| <input type="checkbox"/> June | <input type="checkbox"/> December |

Q-4 On average, how much does your department or center pay for **space, food and lodging per person per night**?

Amount \$ _____

Q-5 On average, how far do you travel to reach off-campus meetings or retreats?

- Under 30 miles
- 31 to 50 miles
- 51 to 100 miles
- 101 to 200 miles
- Over 200 miles

Next, we would like to ask you some questions about future off-campus meeting/retreat demands.

The School of Architecture and Allied Arts (AAA) is studying the feasibility of building a study and retreat center at the Shire, which is located on the Columbia River, directly across from Multnomah Falls. The Shire has unique landscape features, such as carefully sculpted and groomed lawns, meadows, woods, and walking paths. It is approximately a 2.5 hours drive from the University.

Potential accommodations at the Shire include: a great room with a capacity to seat 40 to 60 people for lectures, meetings or dining; kitchen facilities; classrooms; studios; a small library; and sleeping quarters for 40 people.

Q-6 Please indicate how your department or center might use this facility. If your department would never use the facility, please skip to Question 8.

Event	Yes, No, or Maybe	# of people	Which season(s)?	Length of stay
Conference				
Retreat (within dept.)				
Field based class				
Independent study groups				
Donor and alumni events				
Board meetings				
Student orientation				
One day meeting/class				
Other: _____				

Q-7 Please indicate how important each of the following amenities and services are in planning off-campus retreats and meetings at the Shire?

Amenity	Very Important	Important	Neither Important Nor Unimportant	Unimportant	Very Unimportant	Don't Know
Meeting Spaces						
Large Meeting Room/Dining Room (40 – 60 capacity)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Outdoor Eating Area	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Small Meeting/Studio Space (15 – 20 capacity)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Outdoor Classroom	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Outdoor Amphitheatre	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lodging						
Group Accommodations (4 – 10 per room)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Double Rooms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Short-term Living Accommodations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other Facilities						
Small Library	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Room with Sinks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Kitchen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Services						
On-site Caretaker	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Catering/Meal Service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Housekeeping	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Laundry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Internet Access	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Video Conferencing Equipment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Finally, please tell us about your department or center.

Q-8 What department or center do you represent?

Name: _____

Q-9 How many people are in your department or center?

Number of Faculty _____

Number of Staff _____

Number of Students _____

Thank you for participating in the Shire Feasibility Survey!

Appendix B

Summary of Interviews with Potential Users

To determine if groups beyond those at the University of Oregon would use the proposed Study and Retreat Center at the Shire, CPW identified potential non-University of Oregon user groups that are involved with the arts, architecture, planning, and the environment. A total of 46 professional organizations, foundations and nonprofits were identified in Oregon and Washington.

Of the 46 groups identified, 29 agreed to participate in a short phone survey. The purpose of the survey was to identify the types of facilities potential users currently use, whether they would consider using the proposed meeting facilities at The Shire, how much they currently pay for offsite facilities, and what types of facilities and amenities they would require at the Shire.

Offsite Meetings/Retreats

The first question asked the number of off-site meetings/retreats the group/organization had during the year. Of the 29 respondents, 20 held meetings/retreats at offsite locations for meetings and/or retreats. Table B-1 shows that of the 20 groups, approximately one third of them use offsite locations once a year or less, and another third use them five to eight times a year.

Table B-1: Number of Offsite Meetings/Retreats Per Year

Number of Meetings/Retreats	%
Once or less a year	36%
2-4 times a year	11%
5-8 times a year	37%
9 times a year or more	16%
	100%

Next, respondents were asked for what reasons they used offsite locations. Table B-2 shows that of the 20 groups, the majority of the respondents use offsite locations for retreats (board, staff, or membership).

Table B-2: Type of Offsite Location Use

Offsite Location Use	%
Retreats	65%
Strategic Planning	15%
Conferences	10%
Workshops/trainings	50%
Awards Ceremony	50%
	100%

The next question asked respondents where they usually had their offsite meetings. Of the 20 groups holding offsite meetings/retreats, 40% used hotels or lodges. The other groups used a variety of places including Portland State University, the Multnomah Arts Center, homes of board members and/or donated spaces.

One of the goals of the interviews is to get a sense of what groups are willing to pay for offsite facilities. CPW asked respondents, on average, how much did the groups pay for meeting space? The answers ranged from free to \$650 per person for a retreat to San Francisco, which included airfare, hotel and meals. For overnight offsite facilities, \$150 per person was quoted by one group, which included meals and hotel. For just day usage, prices ranged from \$17 per person for food to \$40 per person for food and parking.

Potential Use of Shire

Respondents were asked, based on a description on The Shire, if they would consider using the proposed space for a meeting or retreat. More than three quarters (80%) of the 20 respondents that use offsite facilities indicated they would consider using The Shire. The prospect of having a site that was close to Portland but far enough away to provide a refreshing environment was appealing to several of the groups headquartered in the metro area.

Since most of the groups/organizations use offsite facilities for some sort of meetings, amenities such as computers, projectors, access to the Internet and other high-tech equipment were listed as a condition for use of The Shire. One organization noted, "Having a media room is a necessity. We would only consider the Shire if it had some sort of media room and computer access." Moreover, respondents indicated that having some sort of food options on site (either catered or a kitchen) is an important component.

Some groups that were already familiar with the site were particularly enthusiastic about increased use in the future, saying, "It would be more appealing to utilize the Shire again when it has the new amenities, because we could do overnight retreats with board-something we have not done in the past but have been considering." Another organization was excited about The Shire as long as it was modernized, "Our organization would be willing to pay more in return

for having a high-tech modern facility complete with a media room, Internet access and a copier and fax machine.”

Of the 20% of respondents who would *not* consider using the Shire, reasons included location, “We need to go to big cities because that is where our work is,” and size, “We would need a facility which could hold 300 people, and it does not seem like The Shire would be big enough.” In addition, several of the organizations that were contacted had Oregon specific missions that required them to patronize facilities in Oregon. “The focus of our organization is on Oregon land-use policy, we would not go to a retreat in Washington.”

Conclusion

Based on this initial query of organizations, it appears that some outside groups are interested in The Shire. As Table B-3 indicates, there are a variety of potential Shire users from the arts community (Oregon Potters Association and the Columbia Gorge Arts & Culture Council) to foundations, (Ford Family Foundation and the Meyer Memorial Trust) to environmental nonprofits (Oregon Nature Conservancy and Friends of the Columbia Gorge). Also, there was interest from several of the AAA professional organizations such as the Seattle, Washington and Lake Oswego, Oregon Chapters of the American Society of Landscape Architects. Many of the organizations that we called that expressed interest in the Shire are from the Portland Metro area. This area, because of its proximity to the Shire and the concentration of organizations, could be targeted for marketing.

Table B-3: AAA Related Professional, Foundations and Nonprofit Groups

Interested Potential Users

Architecture Foundation of Oregon
Columbia Gorge Arts & Culture Council
Ford Family Foundation
Friends of the Columbia Gorge
Grantmaker of Oregon and Southwest Washington
Historic Preservation League of Oregon
Meyer Memorial Trust
Northern Pacific Chapter of International Interior Design Association
Oregon Arts Commission
Oregon American Society of Landscape Architects
Oregon Chapter of the American Institute of Architects, Portland
Oregon Nature Conservancy
Oregon Potters Association
Regional Arts & Culture Council
Spirit Mountain Community Fund
Washington American Society of Landscape Architects, Seattle

Not Interested Groups

1000 Friends of Oregon
Oregon Community Foundation
Oregon Progress Board
WA Chapter of the American Institute of Architects
WA Chapter of the American Society of Landscape Architects
WA Chapter of the American Planning Association

Appendix C

Summary of Case Study Facilities

CPW seven identified facilities across the country that could serve as insightful models on the management of a field school. These facilities represent a range of possibilities for operating field schools. This Appendix provides a summary of each of the following facilities:

- Ashokan Field Campus, State University of New York at New Paltz's
- Horn Field Campus, Western Illinois University
- Lorado Taft Field Campus, Northern Illinois University's
- Oregon Institute of Marine Biology, University of Oregon's
- Tilikum Center for Retreats and Ministries, George Fox University
- IslandWood, Bainbridge Island, Washington
- Sitka Center for Art and Ecology, Otis, Oregon

Ashokan Field Campus, State University of New York - New Paltz

Ashokan Field Campus is a 372-acre facility with a capacity of 134 overnight guests located in the foothills of the Catskill Mountains of upstate New York. The property is owned by College Auxiliary Services, a subsidiary of the State University of New York (SUNY) at New Paltz. Ashokan is run as a nonprofit that offers educational programming for youth and weekend conference and retreat space for adult groups year round. The SUNY New Paltz campus is thirty miles away from Ashokan. It is booked 80% of the year, primarily by K-12 school groups; however, overnight use is only 38% of the maximum capacity. Less than 3% of the bookings have come from University groups in the past two years.

Programs

Educational programs for school groups are offered on weekdays during the school year. Residential school programs last between two or five days, however, day programs are also available. Ashokan staff offer youth classes in natural history, colonial crafts, adventure education, living history, and seasonal topics. Ashokan's also provides retreats for adults including Harvest Festival, NE Blacksmith, and Summer Songs

week, among others. Some of these retreats are sponsored by outside groups and held at Ashokan, while others are organized by Ashokan staff. All retreats that are open to the public are advertised through the Ashokan website.

Facilities

Approximately 50 of the 372 acres at the field campus are developed. There are twelve buildings on-site but only seven of them are outfitted with plumbing and electricity. Several buildings are used in conjunction with the colonial crafts and living history programs and do not require these amenities. The meeting space available at Ashokan includes one of these historic buildings and can accommodate 75 people. Other meeting space is provided by modern buildings- the dining hall that can accommodate 120 and three smaller spaces that can accommodate 30 people each. An outdoor pavilion also provides shelter for outdoor meetings.

Ashokan offers numerous special outdoor spaces, including a fire circle, a porch, a lake, forest, fields, ponds, and Cathedral Gorge, created by Esopus Creek.

Ashokan can accommodate 120 people overnight in two dorm style buildings with bunk beds. The buildings have community bathrooms for males and females, respectively. One bunkhouse also includes two private rooms with private baths. An additional lodge with three bedrooms and two bathrooms can accommodate fourteen people. The lodge also offers a small kitchen.

Table C-1: Meeting Room Descriptions

Room	Maximum Occupancy	Special Features
Dining Hall	120	Fans, tables on wheels that fold up
Auxiliary Dining Hall	30	Tables on wheels
Pewter Shop	75	Wood stove, student desk chairs
West Wing	30	Sliding wall converts it to two small rooms
Recreation Room	30	Armchairs
Discovery Room	10	--

Services

Ashokan has a full service kitchen and meal plan that overnight users are required to use. Meals are offered in both buffet and family style. Day users of the facility are welcome to bring their own food, but a kitchen is not available for their use.

Ashokan provides pillows and blankets for guests, though most bring their own sleeping bags. The Ashokan staff launders the facility's bedding and also provides cleaning services for the facility. There is also a small store at the field campus that sells toiletries.

Staffing

The Ashokan staff includes a director, an assistant director/program coordinator, a coordinator of special programs, a marketing manager, an administrative secretary, and a maintenance manager, all of whom are full time employees. Most of the year, a kitchen staff that includes 3 FTE cooks, 1 FTE chef/manager, and 6 part time helpers are also employed. The maintenance manager, coordinator of special programs, and the director all live on site. In addition, there are thirteen instructors that are employed by and live at Ashokan during the school year. The budget for staff is \$591,000 plus \$277,770 for benefits that include medical, dental, life insurance, a retirement program (TIAA-CREF), and generous vacation and sick leave accrual.

Table C-2: Staff Positions

Position	Level of employment
Director	1.0 FTE year round
Assistant Director/Program Coordinator	1.0 FTE year round
Coordinator of Special Programs	1.0 FTE year round
Administrative Secretary	1.0 FTE year round
Maintenance Manager	1.0 FTE year round
Chef Manager	1.0 FTE year round
3 Cooks	1.0 FTE year round
2 Cleaning staff	As needed year round
13 instructors	1.0 FTE during school year
6 Kitchen helpers	As needed during school year

Reservation System

Ashokan field campus is available for reservation by any interested user group, so long as they do not pose a hazard to the facility or have a mission contrary in purpose to Ashokan. Overnight groups must have a minimum of 25 people to make a reservation because this represents the break-even point for the expense of the food service. Ashokan will try to double book smaller compatible groups in order to accommodate them while still reaching their threshold for minimum group numbers.

The administrative secretary is responsible for making reservations for educational programs, signature retreats, and private retreats. In its goal to maintain strong ties with SUNY New Paltz, user groups from the University are given priority booking. SUNY New Paltz students are also given a 25% discount on food and lodging and are able to charge meals directly to their meal plan accounts with the University. Students are charged regular prices for Ashokan programs. However, the Ashokan campus is available for day use (hiking, swimming) by members of the SUNY New Paltz community free of charge.

The Ashokan website includes a section on outside sources of funding for K-12 school groups that may need additional funding for an Ashokan visit. Tax-exempt organizations may present their certification to avoid tax payment on the entirety of Ashokan services. The following

chart shows the cost of the facility for those not participating in the education programs, as well as the cost for the school groups participating in the education programs.

Table C-3: Facilities Rental Fees Per Person

Group	Length of Stay	Lodging and 3 meals
SUNY New Paltz or Ashokan Co-sponsored groups	1 night	\$13.10
Outside groups	1 night	\$17.46
Program Participants		
3 day (80 people minimum)	3 days	\$170.00
5 day (80 people minimum)	5 days	\$284.00

Any group can get a \$2 per person discount if they do their own cleaning of the facility. Groups that stay longer than four nights will also receive discounted rates

Groups that are not affiliated with SUNY or attending the facility as part of an Ashokan sponsored or co-sponsored event are asked to provide proof of liability insurance for \$2 million. However, Ashokan will entertain requests to waive this requirement if they deem the group to be a low liability risk. All waivers are on a probationary condition and are subject to modification based on actual history. The following rating system of factors is used to determine if a group may be granted a waiver upon request:

Table C-5: Liability Rating System for Waiver

Group size factor:	(A) under 35 (B) 35 - 70 (C) 70+
Program risk factor:	(A) Meetings, lecture, seminar, low activity workshop (B) Moderately athletic, closely supervised activities (C) High risk and/or loosely supervised
Group make-up:	(A) Adult, general population (B) Youth, general population (C) Special population

Guideline (the order of letters is not significant):

- AAA rating- Liability Insurance Requirement will be waived
- AAB rating- Liability Insurance Requirement may be waived
- ABB or less- Liability Insurance Requirement will not be waived

Budget

In addition to the staffing costs outlined above, major expenditures by the facility include program specific costs and a \$10,000 marketing budget. Maintenance costs are outlined in Table C-6.

Table C-6: 2004 Maintenance Budget

Utilities (Includes Telephone)	Janitorial/Laundry	Grounds Keeping & Building Maintenance
\$43,000	\$6,000	\$27,000

Ashokan makes the greatest returns from their overnight outdoor education programs during the school year, followed by use of the facility during weekends and summer retreats.

Lessons Learned

Staff attributes the low percentage of university user groups to the distance between Ashokan and New Paltz—a 45-minute drive. Being open to diverse user groups has been key to the success of Ashokan, because it enables the facility to be booked most of the year. However, they still struggle to fill the space during the winter months. Jonathan Duda, Coordinator of Special Programs, also attributes their success in booking to the marketing emphasis they place on the natural beauty of the location. To increase their bookings in the future, they intend to develop better housing to accommodate requests for private rooms. They are considering developing both private and semi-private lodging.

Ashokan Field Campus Contact Information

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Horn Field Campus, Western Illinois University

Horn Field Campus is a 92-acre facility that can accommodate 28 overnight guests and is owned by Western Illinois University's College of Education and Human Services and administered by the Department of Recreation, Park and Tourism Administration. The field campus is located five miles south of the University and is frequently used by University groups for meetings and outdoor day programs. University users constitute 40% of all the groups that utilize the field campus. The other 60% of guests are members of the public that visit Horn for private events including corporate retreats, weddings, and family reunions. Horn is open year round and is booked for approximately 65% to 75% of the year; about 60% of the facility usage is from day users.

Programs

A variety of programs are offered at the field campus for youth and adults. Programs are offered in both residential and day use formats. Programs include classes for adults, such as a wilderness first responder and first aid class; group team building programs for any age; adult weekend retreats; summer youth camps; and seasonal offerings, such as a corn maze.

Facilities

A third of the campus' 92 acres are developed. One third is a passive recreation area with five miles of trails. Another third is farmed by the University's Department of Agriculture; profits from corn sales are split evenly between the Agriculture Department and the field campus.

The buildings on the campus include three cabins, a lodge, an office building, a trailer that provides housing for staff residents, and two storage sheds. The lodge, which serves as both the primary meeting space and the dining hall, can accommodate 50 people. The three cabins have bunk beds and a shared bathroom. In total, the cabins can sleep 28 people. When slightly larger groups request accommodation, Horn will allow people to set up tents; however it is not something that they advertise or encourage.

Despite the small size of the buildings, the Horn field campus has a gravel parking lot that is approximately 90' x 50' and an additional gravel lot that is twice that size to accommodate special events like the haunted Halloween corn maze. The secondary lot serves as storage space when additional parking is unnecessary.

Table C-7: Meeting Room Description

Room	Maximum Occupancy	Special Features
Lodge	50 people	Air Conditioning, Fireplace

Services

Groups are responsible for arranging their own meals. There is a kitchen in the lodge that is available for groups to use for their own cooking. Horn also provides groups with a list of local catering service options; the list includes the University catering service and specifies that alcohol can only be consumed on the premises if it is served by the University's catering service.

Guests can bring their own linens or lines can be rented from the University for a \$9 fee. Groups can choose to either pay a \$50 fee for cleaning services or clean the facility themselves. A \$50 refundable deposit is held until Horn staff inspects the facility for cleanliness.

Other services that Horn offers include customized room set up (\$15-\$20) and the sale of campfire wood. Although groups are also welcome to bring their own wood for a campfire, \$12/day entitles them to unlimited use of the field campus' supply.

Staffing

The chair of the Recreation, Parks and Tourism Department provides oversight of the facility. The department secretary is responsible for reservations, billing, payment, and website management, a job that accounts for a quarter of her FTE. The on-site staff at Horn includes one FTE Program Coordinator, who acts as director of the facility, and several students from the Recreation, Park and Tourism Department.

During the school year, three to four graduate students are employed for 0.4 to 0.5 FTE a week in the positions of Challenge Course Manager, Assistant Challenge Course Manager, Programs and Promotion Assistant, and Sustainability Assistant. Between two to three additional student facilitators are hired to assist with the team building and adventure courses, but their work schedule is limited to when these programs are scheduled. Two student maintenance workers are also hired at 0.4 and 0.5 FTE, though only one is retained over the summer. A graduate student is hired full time over the summer to run programming. Two to six additional staff are also brought on as staff for the summer youth camps.

Table C-8: Staff Positions

Position	Level of employment
Program Coordinator (Director)	1.0 FTE year round
Secretary	.25 FTE year round
Maintenance worker	.5 FTE year round
Maintenance worker	.4 FTE during school year
Challenge Course Manager	.4-.5 FTE during school year
Assistant Challenge Course Manager	.4-.5 FTE during school year
Programs and Promotion Assistant	.4-.5 FTE during school year
Sustainability Assistant	.4-.5 FTE during school year
2-3 Facilitators	As needed during school year
Summer Programs Coordinators	1.0 FTE during summer
2-6 camp staff	1.0 FTE during summer

Reservation System

The secretary of the Recreation, Park, and Tourism Department manages the reservation system. Reservations can be made up to a year in advance and are filled on a first come, first serve basis. A signed contract is required to hold the requested reservation. On site staff can give people general registration information, but groups must contact the secretary to make the reservation and pay for their stay. On-site staff can collect money in special circumstances (for example, if a groups adds a service or people at the last minute), but it is typically done ahead of time. Program Fees must be received two weeks (14 days) prior to the reservation date. The fees are as follows:

Table C-9: Facilities Daily Rental Fees

Facility	Fee
Commons Area/Play Field/Hiking Trails	\$12.00
Lodge	\$24.00
Cabins	\$4.00 per person (minimum of \$15.00 per cabin)

Western Illinois University academic classes do not pay for the use of facilities, including the lodge, cabins, and commons area. They are charged for activities and programs such as the teams course, high course, corn maze, etc. but the rates are \$2 less per person than those charged to non-University groups. Day use of the campus' trail system is free to both students and the public.

All non-University groups that come to Horn must provide proof of insurance, either by naming Western Illinois University as an additional insured on their own insurance policy or by purchasing insurance through the University. The minimum amount of liability insurance that groups must have to use the facility is \$1 million. The University facilitates the process for users' with their own insurance policy by contacting their insurance carrier upon request and by keeping copies of repeat users' insurance policies on file. For groups that do not have the required insurance, the University will act as a pass through to sell event insurance through a Master Venue Policy that they use for all of their campus facilities. The cost of purchasing insurance through the University is based on how many days and how many people attend the event, as well as what activities they will engage in (the high risk adventure programs require higher fees). Quite a few of Horns' user groups do purchase this insurance and it typically costs them \$100-150/day.

Horn assesses cancellation fees in the event that a cancellation is made less than two weeks prior to a reservation. Fifty percent of the total fees are refunded when cancellations are made 7-14 days in advance; 25% of the total is refunded with 1-7 days notice; and no money is refunded in the event that Horn is given no advance notice of the cancellation.

Budget

The University's Recreation, Park, and Tourism Department budget covers the salary of the FTE Horn Program Coordinator, as well as that of the department secretary who devotes 0.25 of her FTE position to Horn. These are both civil service positions. Funding for all other staff positions at Horn are generated from facility revenues. Western Illinois University treats the Horn Field Campus facilities, for the most part, like other facilities on its main campus. The Recreation, Park, and Tourism Department does not maintain a line item budget for the field campus' expenses. The cost of utilities and major maintenance projects for the facility are absorbed by the University as is the cost of gas for grounds keeping equipment. However, minor maintenance projects are funded directly by Horn field campus revenues and the Department Chair plans to develop a better internal tracking system of expenditures in the future. The Chair is also responsible for submitting a capital development plan to the Dean of the College of Education and Human Services on a yearly basis.

Lessons Learned

Loyalty to the field campus among University students has been an important part of Horn's success. Interim Program Coordinator Jarrah Buch says that the students, "love the facility and return year after year." She attributes the popularity of the field campus to its proximity to campus, its unique features, and the introduction that students have to the facility as part of their freshman orientation. Previously this introduction was made via a large display set up on the main campus

during orientation. Now they are trying a new “first year experience initiative” that actually brings freshman to the property. Another strategy they have used to entice students to the field campus is to give freshman \$1 off coupons for the corn maze.

Buch said that if she could make changes to the field campus, her top three priorities would be a larger kitchen facility with commercial size appliances and more space for food preparation, additional lodging capacity to accommodate 35-40 people, and a centralized maintenance storage facility rather than the spread out sheds currently in use.

When asked if she had recommendations for the University of Oregon’s development of the Shire, Buch advised that being flexible to accommodate the needs of diverse users is important. For example, the informal tent camping policy has allowed them to accommodate groups that are slightly larger than 28, thereby increasing their total bookings. Another strategy that Buch has found useful is partnering with students on projects that benefit the facility. Recreation students, in particular, are required to complete an internship that can be fulfilled at Horn, providing the mutual benefit of experiential education and free labor. Other work projects that have provided a mutual benefit include a class project that engaged students in an energy audit of the Horn campus buildings and forestry students routinely remove dead limbs off trees as part of their training. Horn also regularly coordinates volunteer opportunities, such as invasive plant eradication, for students and community members alike.

Horn Field Campus Contact Information

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Lorado Taft Field Campus, Northern Illinois University

Lorado Taft is a 141-acre field campus that can accommodate 165 overnight guests and offers environmental education programs and retreat, conference, and workshop spaces to over 10,000 people per year. It is located 37 miles from Northern Illinois University and is adjacent Lowden State Park. The facility is surrounded by forests and is situated next to Rock River.

Primarily youth groups and teachers use the facility; however, anyone interested in learning and teaching in the outdoors is welcome. Last year, 171 different groups used the Lorado Taft Field Campus. Of these, 49% were school groups in the environmental education program, 10% were Northern Illinois University (NIU) conference groups, and 41% were non-NIU conference groups including church, girl scouts, arts and craft groups, and the local power plant company.

Programming

Lorado Taft Field Campus provides resident environmental education programs to over 7,000 elementary and middle school students each year. Part of the purpose of the environmental education program is to, “Teach an appreciation, understanding, and awareness of the natural community by studying and interacting with the natural world.” The curriculum for each school group is designed with a Lorado Taft staff member and the school’s teaching team. Examples of topic areas include geology, forest ecology, orienteering, survival, birding, water ecology and a teams course used to foster community building and problem solving skills. The school groups stay anywhere from 1-7 days, with the majority staying for three days and two nights. Similar environmental education programming is available for other-users and conference groups.

Facilities

There are 15 buildings at Lorado Taft Field Campus with at least one restroom per building. Three dormitories can sleep a maximum of 165 people. All beds are bunk beds; and in each of the three dormitories there is an instructor room, which sleeps two. There are 8 meeting rooms. All except one (Heckman Lounge) have chalkboards. The largest room is 25’ x 30’ and holds a maximum of 130 people. The dining hall seats a maximum of 165 people. A gravel parking lot provides spaces for approximately 70 vehicles. Overflow parking is provided by the adjacent state park.

Table C-10: Meeting Room Descriptions

Room	Dimensions (feet)	Maximum Occupancy	Special Features
Blackhawk	18 x 28	64	AC
Craft Shop	15 x 24	20	Craft utensils
Eagle's nest	23 x 29	84	Fireplace, piano, TV/VCR, AC
Hillside	22 x 41	100	Internet, TV/VCR
Heckman Lounges	12 x 12	15	Lounge Seating, AC
Poley	25 x 33	130	Fireplace, TV/VCR, AC, Internet
Rockview	25 x 40	100	TV/VCR, AC
Science Lab	20 x 39	90	Sink, TV/VCR, AC

Services

All meals at Lorado Taft are prepared by the kitchen staff. No one is allowed to bring in outside food. Meals are served family/buffet style. Linen sets are available at an extra cost (\$7/person). After each customer leaves, the lodging facilities are cleaned by the building maintenance work crew.

Staffing

There are 28 full-time staff members. Of the 28 full-time staff, there are 8 seasonal teachers who work with the Environmental Education Program from mid-August to early June. One full-time nurse also works from mid-August to early June. All university full-time employees receive health, vision, dental, and life insurance equal to one year's salary, plus tuition waivers. The kitchen staff is unionized.

In addition to the 28 full-time staff members, there are about 20 part-time staff that work as needed for approximately \$10/ hour. There are 2 part-time maintenance workers, 2 part-time kitchen laborers and 16 part-time staff members who help program conference groups. The part-time staff members do not receive benefits. Director Dale Hoppe says, "We have so many part-time staff because it isn't easy to find people who are available, and so we need a large pool to draw from. They never all work at the same time. Some might only work once a year."

Table C-11: Description of Full-Time Staff Positions and Salary

Staff Position	Salary	Level of Employment
Director	\$98,000	1.0 FTE
Environmental Education Coordinator	\$53,000	1.0 FTE
2 Assistant Environmental Education Coordinators	\$25,000-28,000 plus utilities required to live on-campus	1.0 FTE
Conference Coordinator	\$38,000 plus housing and utilities required to live on-campus	1.0 FTE
Campus Secretary	\$11.50/hour	1.0 FTE
Food Service Administrator	\$51,000	1.0 FTE
Building and Grounds Supervisor	\$36,000	1.0 FTE
5 maintenance Repair Workers (janitorial, grounds, maintenance)	\$11-18/hour	1.0 FTE
Nurse	\$14/hour	1.0 FTE
Eight Seasonal Teaching Staff	\$1100 per month plus housing, utilities, meals	1.0 FTE
2 Kitchen Laborers (dishwashers)	\$9-15/hour	1.0 FTE
Four Cooks	\$9-15/hour	1.0 FTE
16 Conference Program Coordinator	\$10/hour	.5 FTE
2 Cooks	\$10/hour	.5 FTE
2 Maintenance Workers	\$10/hour	.5 FTE

Reservation System

Lorado Taft is fully booked from Labor Day through mid-December and again from January until Memorial Day weekend. The majority of the customers at this time are school youth groups engaged in the Environmental Education Program. During the summer, there are periods of great activity followed by periods of inactivity. Hoppe says, "We have periods of inactivity in the summer because we have shared housing and many bunks per room, which is less appealing to adults. On the other side, we don't have the recreational facilities youth groups associate with camp. We are an education center and this limits our market in the summer."

The conference and weekend groups need to make reservations one year in advance. Hoppe says, "With the conference programs, we only book one year in advance in order to allow groups to return the following year. Many of our groups have been coming for 20 or more years and we value that long-term relationship." University groups are not given specific priority.

The school youth groups interested in the Environmental Education Program make their reservations all at once. This is done each January in preparation for the following school year.

Table C-12: Lorado Taft Rates

Groups	Length of Stay	Cost of 4 meals	Lodging	Room Tax	Insurance per day	Service Fee	Total
Environmental Education	1 night	\$21.49	\$6.70	\$0.40	\$0.80	\$23.16	\$53.90
University Students	1 night	\$21.60	\$7.00	\$0.40	\$0.40	-----	\$29.40
Conference	1 night	\$27.50	\$9.60	\$0.40	\$0.40	\$12	\$44.50*

*Day use cost of meeting space for conferences is \$14/day/person without meals

Budget

Northern Illinois University provides Lorado Taft with a \$235,000 annual subsidy. The university also pays for all the utilities, which run from \$80,000-90,000 per year and provides free use of the university accounting, purchasing, accounts receivable, architecture and engineering services. Taft receives no other grants or endowments. Major maintenance expenses are outlined in Table C-13.

Table C-13: 2004 Maintenance Budget

Utilities	Grounds	Janitorial	Building Maintenance
\$80,000-\$90,000	\$15,450.11	\$5,760.99	\$59,184.68

Lessons Learned

Director Dale Hoppe says that the field campus has been there for 54 years and that they are the “big dogs in the region.” Lorado Taft is well known for its food and has an overall good reputation. If Hoppe could change anything about the campus, it would be to add a meeting room that has a 165-person capacity. He notes that it is important to have the same meeting room capacity as sleeping capacity.

When asked about advice for the Shire, Hoppe stated, “It will take awhile to develop clientele. It won’t fill up quickly. A commitment to the program is essential.” Hoppe said that a lot of the programs and services would not be possible without commitment and subsidy from the university.

Lorado Taft Field Campus Contact Information

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Oregon Institute of Marine Biology, University of Oregon

The Oregon Institute of Marine Biology (OIMB) is a coastal research center located 122 miles from the University of Oregon. The facility is 100 acres and features one dormitory and four cottages that sleep 86 guests, five teaching laboratories, two constant temperature rooms, a molecular biology lab, darkroom and well-equipped research stations. In further support of research, OIMB offers a shop, dock, a fleet of smaller boats suitable for work in Coos Bay and the immediate coastal ocean, storage facilities, and cottages for visiting faculty and guest investigators.

Students and researchers are the primary users of the facility, but community groups and non-profits organizations are also welcome. Office Manager Joyce Croes estimates that 60% of the users are students, and 28% are researchers and other groups. OIMB is fully booked 2 months out of the year during the summer. The winter months are slow, and they receive moderate bookings the rest of the year.

Programs

OIMB offers a host of courses available for academic credit through the biology department at the University of Oregon. Examples of classes including Animal Behavior, Algae and Photosynthetic Bacteria, and Marine Biology: Comparative Embryology and Larval Biology. There are also seminars on Marine Biology and opportunities for undergraduate research credits. Research opportunities also exist for graduate students interested in Marine Biology or related fields.

Facilities

There are 23 buildings on the 100-acre field-campus. There is at least one restroom per building. The dining hall seats 80. This room can also be doubled as a meeting space. There is an auditorium that seats 100 and five classrooms that seat 100. Multiple research buildings are located throughout the campus. There are well-equipped science laboratories, storage buildings, a library and a dock with small boats.

Table C-13: Facilities

Laboratory and Equipment Fees	Cost
Teaching Laboratory Rental	\$40/day
Auditorium Rental	\$50/ day
Laboratory Space Rental	\$2/sq ft/month
OIMB Research Vessels	\$20/half day

OIMB has a dorm building that sleeps 49 and is comprised of single twin beds in one open room. OIMB is planning to renovate the dorm building this year and put in single dorm rooms. There are four cottages

that have two-three bedrooms each. Combined the cottages can sleep a maximum of 37 guests. The cottages have kitchen facilities and single twin beds.

Table C-14: Lodging and meal costs per week

Type of Room	Cost
Undergraduate dorm room	\$145
Graduate dorm room for long-term (2 years) researchers	\$55
Cottages*	\$125
Meals Per Day	
Breakfast	\$5
Lunch	\$7
Dinner	\$9
*Utilities Extra	

Services

The dining hall offers catered family and/or buffet style meals. Residents staying in the cottages have their own kitchen facilities and are allowed to cook their own food. OIMB only provides linens for residents who forgot their own.

Staffing

There are two seasonal cooks who work full-time in the summer, at the busiest time of year. They work part-time as needed in the fall, winter, and spring. There is an office manager who oversees operations, and 6 other staff members that work full-time throughout the year.

Table C-15: Staff Positions

Staff Position	Level of Employment
Computers and Stockroom	1.0 FTE
Maintenance Coordinator	1.0 FTE
Trades Maintenance Worker II	1.0 FTE
Office Manager	1.0 FTE
Office Specialist	1.0 FTE
Cook	1.0 FTE
Assitant Cook	1.0 FTE Summer, .5 FTE fall, winter, spring
Custodian	1.0 FTE Summer, .5 FTE fall, winter, spring

Reservation System

The Office staff takes care of all reservations. Reservation is open to students, researchers, community groups and non-profits. Student groups receive priority and reservations are based on when students pay their deposit.

Budget

OIMB is budgeted to take in \$95,000 in income for the 2005 year. However, Office Manager Joyce Croes says that this does not reflect the true operational costs of the facility. The University of Oregon general fund covers much of the operational costs listed below.

Table C-16: Budget

Budget Item	Amount
Supplies and Services (covers maintenance and utilities)	\$19,000
Staffing (covers cooks and custodian)	\$78,300
Food	\$20,000

Lessons Learned

The OIMB summer session is the busiest time of year. Office Manager Joyce Croes says, "We are full bore in the summer, but in the fall and winter we have very few students. We have to lay off the cooks during the off-season and re-hire them in the summer. It would be nice to have a more even influx of students throughout the year." Her advice for the Shire is to try and have an even flow of students and groups using the facility throughout the year.

Oregon Institute of Marine Biology

Joyce Croes, Office Manager

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Tilikum Center for Retreats & Ministries, George Fox University

Tilikum Center for Retreats and Outdoor Ministries is a 92-acre field-campus that offers retreats, ropes courses and youth camps to over 11,000 students and adults per year in Newburg, Oregon. The facility can accommodate 60 guest per night in buildings and 56 guests per night in platform tents. It is located eight miles from George Fox University and is adjacent to a lake, meadows and forest. It is fully booked 85% of the weekends and 45% of the weekdays throughout the year. Executive Director Bedford Holmes estimates that only 10% of their business comes from George Fox University. The rest of the business is derived from school groups and religious groups.

Programming

Tilikum operates the largest Day Camping operation in the Portland Area (2,400 children per year). In addition, Tilikum has a challenge course program, Elderhostel retreats, family retreats, and a youth overnight camp.

Youth participating in the Day Camp and Youth Overnight Camp participate in hiking, the challenge course, fishing, boating, nature classes and other recreational activities. Tilikum's challenge course is a collection of ropes, cables, wooden beams, tires, and logs assembled to present activities for the purpose of individual and group growth and discovery. The course is located in a stand of 100-year-old Douglas fir trees.

The Elderhostel is an international organization designed to provide learning experiences for senior adults (55 years and older) in a comfortable, relaxed setting. Non-credit college-level courses are offered during the program sessions. Classes are taught by qualified instructors. A variety of evening activities offer additional enjoyment.

Facilities

There are five buildings at Tilikum and at least one bathroom per building. Tilikum can sleep a maximum of 60 people in 18 rooms. Thirteen of the rooms have private baths, and the other 5 rooms have baths across the hall. All rooms have two to four twin beds each.

Guests also have the option of staying in one of seven platform tents. The tents sleep at total of 56, with four bunk beds in each tent. Meals are not included in the price of the tents, and it is recommended that those staying in tents bring their own barbecue grill or camp stove for food.

There are two meeting rooms that seat 60 and 30 people each. In each room there is a TV, VCR, DVD, flipcharts/dry erase boards, and podium. An LCD projector and sound system are available but must be reserved in advance.

The larger meeting room and dining area are equipped with heat and air conditioning. All lodging and meeting rooms are equipped with individual heat controls. The dining hall seats a maximum of 60.

Table C-17: Meeting Room Descriptions

Room	Maximum Occupancy	Features
Large Meeting Room	60	AC, whiteboard, TV, DVD
Small Meeting Room	30	Whiteboard, TV, DVD

Services

The food is served family and/or buffet style in the dining hall. Guests staying in the lodges must use the meal service. Those staying in the tents have the option of using the meal service, but it is recommended that they make their own food with barbecues and camp stoves.

Linens are available for an additional \$7.50. If guests stay more than 3 days, housekeeping will do a mid-retreat cleaning. Otherwise, rooms are cleaned after each group leaves.

Staffing

There are ten full time staff members at Tilikum. There are also 28 seasonal staff members including four part-time housekeepers, 3 part-time cooks and part-time program teachers that work as needed.

Table C-18: Staff Positions

Full-time Staff Positions	Level of Employment
Executive Director	1.0 FTE
Program Director	1.0 FTE
Retreat Center Director	1.0 FTE
Property Manager	1.0 FTE
Office Manager	1.0 FTE
Retreat Coordinator	1.0 FTE
Day Camp Manager	1.0 FTE
Food Service Director	1.0 FTE
Housekeeper	1.0 FTE
Property Manager	1.0 FTE
4 Housekeepers	.5 FTE seasonal
3 Cooks	.5 FTE seasonal
21 Program Teachers	.5 FTE seasonal

Reservation System

Reservations are made through the Retreat Coordinator. Priority is not given to any particular organization or group. All groups must sign a contract for the services that are offered. Groups typically stay for two nights and eat six meals. Tilikum's busiest time of year is the summer, and the facility is generally filled with students involved in the Youth

Overnight Camp and the Youth Day Camp. School groups and religious groups stay at Tilikum during the fall, winter and spring.

The rates for Tilikum are the same for any group or organization. It costs \$130 per person for two nights and six meals. Guests staying in the platform tents pay \$9.50 per person per night. Meals are not included in the price of lodging for those staying in tents.

Table C-19: Rates Per Person

Nights	Meals	Cost
1	3	\$70.50
2	6	\$130

Budget

Tilikum receives \$58,000 in subsidies from various grants. They receive no subsidies from the University.

Table C-20: Budget

Utilities	Building Maintenance	Total Operational
\$20,000	\$40,000	\$830,000

Lessons Learned

Executive Director Bedford Holmes says that having a good reputation is essential. He says, “We have a great reputation as a youth camp and retreat center. Plus, our setting is beautiful.” Holmes says that he would like to build more lodging and meeting space capacity in order to generate more income. Ideally, he would like the facility to hold 120 beds. Currently, the lodges can sleep a total of 60 people, and Holmes believes he could attract a larger user group with expanded facilities.

Tilikum Center for Retreats and Outdoor Ministries

Bedford Holmes, Executive Director

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IslandWood, Bainbridge Island, Washington

IslandWood, a non-profit organization located on Bainbridge Island, Washington, is a 255-acre outdoor educational center designed to provide learning experiences and inspire lifelong environmental and community stewardship. It is situated amongst second-growth forests, several types of wetlands, a saltwater estuary, a four-acre pond, and abundant animal and plant life.

IslandWood can accommodate 143 overnight guests. Programs for schools as well as community programs for adults, children and families are offered throughout the year. IslandWood is fully booked Monday to Thursday from September to June with school groups. Conference space is available for both profit and non-profit organizations Thursday-Saturday during the school year, and all week in the summer. Of the conference groups who use the facility, Business Development Coordinator Cynti Oshin estimates that 70% of the groups are non-profit organizations and 30% are for-profit organizations. IslandWood also hosts a variety of community events that are open to the public.

Programs

During the school year (September-June) the center is filled with 4th, 5th, and 6th grade students who come for the 4 day residential School Overnight Program. This program is designed around two themes, Watersheds and Ecosystems. The IslandWood curriculum involves hands-on investigations of the place, its natural and cultural features, and its connections to the students' home communities. Students spend a majority of their time participating in outdoor field study projects, a garden classroom, and teams course. Full-time faculty members at IslandWood consult with the teaching team to determine an appropriate lesson and class plan prior to the IslandWood visit. Faculty at IslandWood also make in-class visits to help the students prepare for the experience.

A Graduate Residency in Education, Environment and Community (EEC) program is offered in partnership with the University of Washington. This program allows graduate students earn credits from the University of Washington while living, learning and teaching at IslandWood. Students receive training in August, and then combine academic coursework with teaching experiences in the School Overnight Program. On completion of the EEC program, many graduates apply their EEC program credits towards master's degree programs in teaching and environment.

IslandWood also offers community programs that focus on sustainable design, art, natural science and outdoor adventure. The program is open to adults, children, families, and professionals of all ages. The mission of the community program is to develop hands-on community and environmental stewardship.

Facilities

The buildings at IslandWood were all designed with sustainable elements. The ten buildings at the center use only 6 of the 255 available acres. Some of the sustainable elements incorporated into the design of the buildings include Forest Stewardship Council certified wood, salvaged wood, a roof designed to capture rainwater, a natural ventilation system and retractable canopies to lessen the summer heat.

There are large and small meeting rooms available at the facility. There is also an art studio and a private dining room, which can both double as meeting spaces. The largest meeting room holds 150 people. All meeting spaces have whiteboards and a projection screen.

Table C-21: Meeting Room Descriptions

Room	Dimensions (feet)	Maximum Occupancy	Features
Great Hall	1,865	150	
Learning Studio Classroom	875	40	
Technology lab	875	16	computer, internet
Art Studio	dimensions unknown	30	straw bale building
Large Conference Room	476	22	video projector and internet access
Friendship Circle	dimensions unknown	100	amphitheatre style, covered fire pit

IslandWood has 3 lodges and one guest cottage that can provide accommodations for a maximum of 143 guests, or 39 single occupancy guests and 104 shared occupancy guests. The lodges are composed of 12 sleeping rooms each, plus a great room for relaxing. There is a private bath and toilet in each room. 10 of the 12 rooms have a combination of queen size, twin and bunk beds, and two of the rooms per lodge have one queen size bed each. The guest cottage has two rooms with a twin and queen bed each.

Table C-22: Lodging Descriptions

Type of Accomodation	# of Buildings	# of Rooms/Building	Group Rooms	Single Rooms
Lodge	3	12	10	2
Guest Cottage	1	2	2	0

Services

The food is prepared by kitchen staff members and is served family/buffet style. Meals cost \$70 per person per day and customers are pro-rated for meals they do not eat. Linens are available with the lodging.

Staffing

There are 56 full-time staff members at IslandWood. There are part-time staff members that fluctuate and work as needed. Business Development Coordinator Cynti Oshin says, “Our part time staff work in every department, including marketing, development, facilities, kitchen, etc. There is no one specific job for part time staff.” All full-time staff members receive benefits.

Table C-23: Staff Positions

Staff Positions	Level of Employment
Executive Director	1.0 FTE
Accounting Assistant (3)	1.0 FTE
Administrative Assistant (2)	1.0 FTE
Annual Fund Coordinator	1.0 FTE
Chef/Food Service Coordinator	1.0 FTE
Lead Cook	1.0 FTE
Cook (4)	1.0 FTE
Assistant Cook	1.0 FTE
Lead Server	1.0 FTE
Business Development Coordinator	1.0 FTE
Communications Manager	1.0 FTE
Community Programs Coordinator	1.0 FTE
Conference Assistant	1.0 FTE
Conference Support	1.0 FTE
Database Specialist	1.0 FTE
Development Assistant	1.0 FTE
Director of Development	1.0 FTE
Director of Education	1.0 FTE
Director of Finance & General Services	1.0 FTE
Director of Marketing and Community Engagement	1.0 FTE
Education Administrative Assistant	1.0 FTE
Facilities Manager	1.0 FTE
Facilities and Maintenance (2)	1.0 FTE
Garden Educator (2)	1.0 FTE
Graduate Program Coordinator	1.0 FTE
Grants Coordinator (2)	1.0 FTE
Graphic Designer	1.0 FTE
Information Technology Support	1.0 FTE
School and Teacher Programs Coordinator	1.0 FTE
Naturalist (2)	1.0 FTE
Lead Instructor	1.0 FTE
School Partnerships Coordinator	1.0 FTE
Staff Instructor	1.0 FTE
Science Coordinator	1.0 FTE
School Overnight Program Registrar	1.0 FTE
Summer Programs Coordinator	1.0 FTE
Maintenance Technician (4)	1.0 FTE
Marketing	1.0 FTE
Special Events Assistant	1.0 FTE
Special Events Coordinator	1.0 FTE
Technology Coordinator	1.0 FTE
Volunteer Resources Coordinator	1.0 FTE

Reservation System

Student groups receive reservation priority. Mission-related non-profits receive priority after student groups. Reservations for the Overnight Program are made through the School Overnight Program Registrar. Conference groups can reserve space through the Conference Support staff position.

IslandWood is generally fully booked ten months out of the year. Oshin says that August and December are quite months for IslandWood. Oshin says, "School groups take up a lot of our reservations and space. During the holidays and right before school starts, we tend to have less demand and visiting school groups." IslandWood is in the process of revising the rates for the upcoming year.

Table C-24: 2004-05 Rates Per Night

Organization	Type of Room	Lodging and 3 meals
Non-profit	Single	\$185
	Double	\$190
	Triple	\$205
For-profit	Entire Lodge (12 rooms)	\$2,595

Budget

IslandWood would not share their budget information with CPW.

Lessons Learned

The success of IslandWood largely draws upon the beautiful location and site of the facility. Business Development Coordinator Cynti Oshin says, "People are drawn to our surroundings. Our focus on nature and environment allow IslandWood to accommodate large amounts of people while preserving the natural landscape and teaching about the environment." Oshin adds, "We work very hard to accommodate our guests. Our food is superior and take customer service very seriously." Advice she has for the Shire would be to "Focus on the service and level of detail. People know quality when they see it."

IslandWood

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Sitka Center for Art & Ecology Otis, Oregon

Sitka Center for Art and Ecology is a non-profit institute located on a 0.65 acre plot on the slopes of Cascade Head on Oregon's central coast. The property is bordered by a Nature Conservancy Preserve, the Siuslaw National Experimental Forest, and the Salmon River Estuary; it is also within the Cascade Head Scenic Research Area. Founded 35 years ago, Sitka Center offers a unique natural setting and multiple studio spaces for both public workshops and concentrated study by artists and naturalists. The center hosts workshops from June to September taught by a variety of visiting instructors. From October to May, Sitka Center hosts a residency program for no more than three artists and naturalists at a time. Only instructors and individuals in residence are provided with housing accommodations. Overall, the facility is filled 85% to 90% of the year.

Programs

Sitka Center workshops are offered by a variety of visiting instructors from around the Northwest and beyond. Workshops generally fall into the categories of sculpture, printmaking, photography, nature, drawing and painting, fiber arts, glass, jewelry/metals, and various media. The workshop season runs from June to September. This is the busiest time of year at Sitka Center and their facilities are nearly 100% filled.

New prospective instructors must apply to teach workshops at Sitka. A prospective instructor must first contact the executive director or program coordinator to pitch their workshop and then, if their idea is well received, he or she must submit a full proposal. The proposal includes a description of the workshop, the number of days it would last, preferred dates, the instructors' daily fee, the materials fee, the maximum number of participants, age and skill requirements, a materials list, an instructor biography, and three references. Proposals are reviewed by a workshop committee and Sitka staff for mission fit, quality of instruction, and both financial and calendar feasibility. The calendar of workshops is established annually, six months prior to its publication in late winter.

When workshops are not being offered (October- May) Sitka Center offers accommodations and studio space to a limited number of artists and naturalists in residence. Prospective artists and naturalists in residence must apply to the center explaining how the residency would support their work. The residency program will host individuals for up to four months (October- January and February- May), but some individuals choose to do shorter residencies. The facility is typically full 80% of the residency season.

Sitka Center also hosts an event in Portland called the Sitka Art Invitational. Originally conceived of as an annual fundraiser, this event is now considered an important component of Sitka's outreach and is referred to by staff as a program. At the Art Invitational, artwork by artists connected to Sitka Center is showcased along with their

biographies and statements. This introduces a larger audience to the Sitka Center mission and the opportunities that exist there for the public. Artwork is also sold, raising money for the artists and Sitka Center.

Facilities

Sitka Center has four studios that are designed to be multi-use. Two of the studios have specialized equipment for sculpture and printmaking, but even in these spaces, equipment is movable to facilitate use of the space for other purposes. Two outside accessible bathrooms service the studios without restroom facilities. The Center also includes a building called the Collins Centrum which includes a reception area, offices, and the Hale Reference Library. The Library is used as a writing studio/research library for art and natural science. There are three apartments at the center, each with their own kitchen and bathroom. The centers' outdoor facilities include the Harold Hirsch Sculpture Garden and the Maveety Courtyard. Sitka hosts a wireless connection that covers half the campus and has networked printing. For an auxiliary office building that is not covered by the wireless service, they have hard-wired Internet service. Sitka Center's video and DVD equipment can be moved to any of the classroom locations.

Table C-25: Meeting Room Description

Room	Size	Special Features
	Maximum occupancy of	
Hale Reference Library	18	Wireless internet, networked printing
Sculpture Studio	800 sq ft	Kilns, ceramic wheel
Smith Studio	850 sq ft	Bathroom (can double as darkroom), three sinks, and printmaking equipment: 3'x6' etching press, 7' polypropylene sink, aquatint box, and 42"x52" drying rack
Boyden Studio	1200 sq ft	Big bathtub sink and small sink
Edelman Studio	860 sq ft	Easily darkened for audio-visual presentations

Services

Sitka Center's accommodations are limited to individuals in the residency program and to workshop instructors. Participants who come to study in a workshop must make arrangements off-campus, a process that Sitka Center facilitates, in part, through its website. In addition to listing numerous places to stay in the area on their website, Sitka also offers an interactive housing forum that functions as an online bulletin board. Participants who are either seeking housing or seeking roommates for a rental can post announcements to their fellow participants, which facilitates the process of finding suitable accommodations.

Sitka does not offer a dining service of any kind. Residents and visiting instructors staying in the apartments have their own kitchens. Workshop participants must bring their own provisions for lunch.

Staffing

There are only two full time, year round employees at Sitka: an executive director and a communications and development director. Sitka also employs three office personnel for 20-24 hours a week each. Their duties include data entry, communicating with the public on phone and in person, financial tracking, and reporting to the board of directors. All of the above positions are salaried and include a benefits package. During the workshop season (June- September), Sitka also employs a full time summer intern who lives on site. The intern acts as a liaison between students, instructor, and the administration. S/he greets evening arrivals, speaks to groups at the beginning of the workshop about Sitka Center logistics, and also sets up and cleans up workshop spaces. Sitka Center is overseen by a board of directors.

Table C-26: Staff Positions

Position	Level of employment
Executive Director	FTE year round
Communications and Development Director	FTE year round
3 Office support personnel	.5 FTE year round
Intern	FTE during summer

Reservation System

Sitka's workshop offerings are published online and in a paper catalog that is published once a year and distributed in the Willamette Valley between Portland and Eugene, and on the coast from Astoria to Yachats. They publish 35,000 catalogs annually and mail out 10,000 in a bulk mailing. The website maintains a current list of the status of each workshop so that prospective participants can easily learn how close a class is to reaching its maximum occupancy or how many people are already on the waiting list.

To register for a workshop, participants can either call the center, mail or fax a registration form, or register online. Sitka Center works on a first come first served basis, though members (financial supporters) are given a two week lead period for registration. Members also get various discounts on workshops that are based on their level of donation. To secure a place in a workshop, participants are required to pay in full. If participants need to cancel a registration they will be given a full refund, minus a \$25 administrative fee, if they provide written notice within 21 days of the start of the workshop.

The fees for workshops are based on instructor fees. Sitka establishes a per person fee that will cover the instructor fee if as few as five participants sign up. The fees paid by additional participants go

towards administration and facility costs. In the event that fewer than six people sign up for a workshop, a provision in the instructors' contract is applied which reduces their fee. If fewer than four people register for a workshop ten to fourteen days prior to its start, Sitka will cancel it.

Budget

Twenty-six percent of Sitka's budget comes from workshop tuitions and 27% comes from individual donations. Memberships, project grants, and the Art Invitational account for the remaining streams of income. Major expenditures are outlined in Table C-27.

Figure C-27: 2004 Maintenance Budget

Utilities	Grounds	Building Maintenance
\$7,100	\$2,500	\$3,750

Lessons Learned

Sitka Center's executive director, Randall Koch, feels that the balance of public workshops and individual quiet research has worked well for their facility. Though they require different types of management,¹⁴ they have also brought a variety people in touch with Sitka Center in a way that specializing in only one type of program would not. However, he notes that the limited amount of housing that is available on-site has probably resulted in a limited diversity of constituency economically for the workshop program.

When asked if he had any recommendations in regards to development of the Shire, Koch stressed the importance of a clear mission statement. A mission statement that depicts both the vision of the facility, and what its parameters are, will help ensure that it is developed in a coherent fashion in perpetuity, no matter who is involved over the years.

Sitka Center for Art and Ecology Contact Information

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¹⁴ For information on management of artists in residency programs, Koch recommends the Alliance of Artists Communities guidelines.