

REQUEST FOR PROPOSALS (RFP)

Preparation of a Conceptual Master Plan
For the Shadow Pines Property at
2701 Atlantic Avenue, 1950 Clark Road and 745 Whalen Road

Issued by:
Town of Penfield

Contact person:
James Costello
Director of Developmental Services
Town of Penfield
3100 Atlantic Avenue
Penfield, New York 14526

A. Introduction

The Town of Penfield acquired the properties at 2701 Atlantic Avenue, 1950 Clark Road and 745 Whalen Road, Penfield, New York 14526 for the purpose of a combination of open space, green space, passive and active recreation and general municipal uses such as a community center, library, lodge(s) playgrounds, trails or other public facilities consistent with the recommendations of the Shadow Lake/Shadow Pines Community Advisory Committee Final Report dated September 2, 2016 and the Shadow Pines Land Use Advisory Committee Final Report dated April 17, 2019.

Background

The subject properties consist of 206+/- acres, known as the former Shadow Pines Golf Course. The Town of Penfield acquired the properties in April of 2018 after a successful bond vote in February, where 80% of those voting supported the Town purchasing the property for those uses listed above. Since the acquisition of the property, the site has been cleared of dead, dying or diseased trees with ongoing work efforts in this area for general public safety.

Walking paths have been mowed from the former #1 tee box to the #9 green for public use, and the former back nine is open for hiking. X-country skiing and snow shoeing activity has taken place, weather permitting, with the Penfield School District grooming trails for team practice and public use; and Penfield School District X-country Track will hold events there this fall. The Town envisions a logical, multi-phased approach to include the recommendations of the Shadow Lake/Shadow Pines Community Advisory Committee Final Report dated September 2, 2016 and the Shadow Lake Land Use Advisory Committee Final Report dated April 17, 2019, as well as well-reasoned recommendations from the public during the plan review process.

B. Scope of Work Outline

The final work product will include the following:

1. Preparation of a draft Conceptual Master Plan for the properties.
2. Participation in a public informational meeting for the purpose of allowing the public to review the draft plan and obtain input to revise the plan based on public comments, if necessary.
3. Preparation of a final Conceptual Master Plan based on public and staff comments.

C. Resources Available

1. Shadow Lake/Shadow Pines Community Advisory Committee Final Report dated September 2, 2016.
2. Shadow Pines Land Use Advisory Committee Final Report dated April 17, 2019.
3. Property mapping provided by Town staff.
4. Town staff input.

D. Specific Consultant Products

1. Ten (10) copies of the final Conceptual Master Plan.
2. Ten (10) copies of an Executive Summary
3. One (1) electronic version of the final Conceptual Master Plan and Executive Summary in an approved format.

E. Project Time Frame

The project is anticipated to begin by Thursday, October 3, 2019 and be completed no later than Friday, November 22, 2019.

F. Proposal Due Date

Ten (10) copies and one (1) electronic version of the Proposal are due in the Director of Developmental Services office by 5:00 p.m. on Friday, September 20, 2019.

Proposals should be sent, and questions directed to:

James Costello
Director of Developmental Services
Penfield Town Hall
3100 Atlantic Avenue
Penfield, New York 14526

Phone: (585) 340-8642
Email: Costello@penfield.org

G. Proposal Format

For the purposes of evaluation, each Proposal should be submitted in the following format:

1. Title Page and Table of Contents
2. Narrative Description – include enough discussion to demonstrate an understanding of the project objectives.
3. Approach, Scope of Services and Schedule – provide a detailed scope of services that describes by tasks what will be done. A general scope of work is outlined under Section B. You may base your scope of services on these tasks, or suggest alternative tasks that could improve the ability of the project to meet its objectives. The Town of Penfield wants to allow maximum flexibility for the ideas, initiative and creativity of the candidates. Fully explain and justify your approach and any recommendations that significantly depart from the general scope. Include a schedule for completion of the project showing the duration of each task and all major milestones.
4. Organization and Staffing – the Proposal should identify the resources and expertise of its personnel (or subcontractors) who will actually work on or be available for this project. The proposed Project Manager, Principal-in-Charge and key personnel must be identified and their resumes and estimate work hours for each task included. If sub-contractors are used, explain the specific need for the expertise and describe the arrangements.
5. Experience on Similar Projects – include names, addresses, phone numbers and email addresses of contact points with the listed previous clients.
6. Schedule for completion of work.
7. Firms must verify that they are certified to do business in the State of New York and that they can comply with all standard federal and state contracting requirements. They must also verify whether they, or their sub-contractors, have status as a certified minority/woman owned/disadvantaged business enterprise in New York State.
8. Cost Proposal – Should include a staff salary schedule, non-salary cost estimate, and a summary. Method of payment should also be described.

9. Additional Services – Value added services in and above the basic requirements of the RFP may be submitted for consideration by the Town of Penfield.

H. Consultant Selection Process

The Town of Penfield will evaluate all proposals. A final consultant will be chosen based on the respondents' indication of how the following minimum conditions would be met:

1. The firm(s) must have a range of professional skills necessary to complete all of the project tasks.
2. The firm(s) must show its expertise and experience on studies similar to the one proposed herein.

The technical and management submittal will be evaluated and scored by the following criteria:

1. Understanding of study scope
2. Clarity of proposed approach to services
3. Technical competence and project team staff
4. Specific experience in similar projects
5. Availability/capacity to complete the study
6. The firm(s) previous performance record
7. Consultant project manager qualifications

At the conclusion of the evaluation period, all candidates will be advised in writing of their status under the solicitation. The RFP does not commit the Town of Penfield to award a contract, to pay for costs incurred in the preparation of the proposal, nor contract for services.

R. Anthony LaFountain
Penfield Town Supervisor
On behalf of the Penfield Town Board

Town of Penfield
Shadow Lake/Shadow Pines Community Advisory Committee

Final Report to the Penfield Town Board

Date Submitted - September 2, 2016

Committee Members

Jim Almstead	Craig Kalkman
Mike Ciavarri	Don Crumb
Lora Downie	Jim Froom
Ray Hutch	Kerry Ivers
Jack Kench	Neal Madden
Dan McCusker	Todd Mihaly
Sam Ogie	Robert Peterson
Art Petrone	John Piper
Tom Putnam	Heidi Rasmussen
Thomas Rocco	Bob Sercu
Wayne Smith	Ann Ziki

Facilitators

Supervisor R. Anthony LaFountain	Ron Peckham
Town of Penfield	The C&S Companies

Technical Assistance and Information Provided by Town Staff

Moratorium Overview and Background Information

In early 2016, Shadow Lake and Shadow Pines golf courses were placed on the market for sale as continuing golfing operations or as currently zoned, half-acre residential development.

On March 23, 2016 the Penfield Town Board adopted a one-year moratorium on development of both properties to allow for time to study potential land uses and associated impacts on town infrastructure.

On April 6, 2016 following an open call for volunteers, the Penfield Town Board named a citizen advisory committee to identify and review all land use options for the Shadow Lake and Shadow Pines properties. This chosen group was known as the Shadow Lake/Shadow Pines Community Advisory Committee (and referred to herein as "the Committee").

The Committee will report back to the Penfield Town Board with findings on possible land uses, opportunities and constraints, zoning, and how potential land uses might be supported, implemented, and funded.

The Committee is made up of a cross-section of Penfield residents and representatives from the school district and the Town's historic preservation and conservation boards. Representatives from the New York State and Monroe County departments of transportation and other subject matter experts will support the group as needed. The Committee will be led by a professional facilitator appointed by the Penfield Town Board.

Committee Charge

The purpose of the Committee is to identify and review all land-use options for both properties and report findings and prioritized recommendations to the Penfield Town Board.

Although the moratorium period is in place until March 31, 2017, the Penfield Town Board will be looking for the Committee's recommendations by late summer/early fall to allow time for the board to review and schedule any appropriate proceedings, if necessary.

The Penfield Town Board charged the Committee to study and issue a written report on the following attributes for BOTH properties:

Identify:

- land-use opportunities
- land-use constraints
- community suggestions for use
- what the community does NOT want to see

Findings for each possible use should include:

- Description of use
- How use would be supported
- How use would be funded
- How use would be implemented
- Opportunities and constraints
- Zoning needs

Committee Assumptions and Objectives

During the Committee's exploration of potential redevelopment and preservation scenarios, there were universal observations, assumptions and objectives that emerged as committee members discussed their own preferences and/or thoughts about the possible future of these properties.

Although it's likely that the committee members' opinions about how these concepts should shape the Town's actions going forward vary across the group, these ideas provide a common ground from which the prioritized recommendations have been developed.

Observations and Assumptions:

- a. The Committee needs to provide its input to the Town Board about the best course(s) of action to address future use/redevelopment of both Shadow Lake and Shadow Pines.
- b. The Committee will make prioritized recommendations to the Town Board regarding future actions related to Shadow Lake and Shadow Pines.
- c. Shadow Lake has recently been purchased and will continue to operate as a golf and racquet club with associated amenities for the foreseeable future.
- d. Although Shadow Lake is currently slated for golf and racquet use, the committee needs to contemplate future use/redevelopment at this time to avoid future moratoriums and/or similar circumstances at some point in the future.
- e. Shadow Pines is slated for sale.
- f. Although, no specific buyer was identified/determined, the Town knows that there is interest from the development community.
- g. The quarry will continue to operate as such for the duration of its economic viability in accordance with current and future permits issued by NYSDEC. It is expected that the economic life of the quarry will be in excess of 25 years, at which time reclamation will occur and the quarry pit will be allowed to naturally fill with water forming a deep, clear-water lake approximately 150 acres in area.
- h. The Town of Penfield's current efforts to have Shadow Pines appraised will help the Town determine whether direct town purchase is an option.
- i. The "do nothing" alternative would likely result in private sale of land with applicable current R-1-20 zoning in place.
- j. There is a concern that the current underlying zoning does not provide legally binding controls to limit the type or extent of development.
- k. There are several legal impacts to consider if the Town Board were to pursue the act of rezoning the properties.
- l. SEQRA regulations would apply to any future scenarios being contemplated for the parcels under review during the moratorium.

Objectives:

- a. To recognize that very different courses of action could result in positive outcomes for the Town now and in the future.
- b. To ensure the proposed action(s) address the community's long-term, best interests.
- c. To explore and recommend future land uses and development scenarios that will minimize or eliminate adverse impacts to community character, traffic, infrastructure operation and maintenance, other negative environmental impacts, and current and future tax burden.
- d. To provide sufficient buffer for existing residential properties bordering Shadow Pines and Shadow Lake.
- e. To understand the modifications to the underlying zoning that may be required to achieve the prioritized outcomes.
- f. To be cognizant of the potential upfront and long-term costs associated with each prioritized recommendations.
- g. To minimize the Town's exposure to costly, resource-intensive law suits.

Preferred Outcomes

During the course of the Committee's efforts to explore many potential options, the committee members developed a series of criteria by which to evaluate and prioritize the options advanced in this report.

- Land use and community character
- Consistency with town plans
- Community support
- Impact to Penfield School District
- Impact to tax burden

The Committee reviewed data provided by town staff, the Penfield Central School District, and other agencies during the development of potential outcomes. The Committee engaged in several internal surveys and in-person votes to determine the preferred options to present to the Town Board, which convey the Committee's preferred outcomes.

Shadow Pines Recommendations

The options outlined in the subsequent sections of this report reflect the Committee's selected options in the order of preference. It is important to note that Option 1 received the highest majority of votes when committee members were polled. Option 2 was determined to be the best alternative if Option 1 could not be implemented.

If the Town Board chooses not to pursue the Committee's first option of a combination of active and passive open space, or its second option, a combination of open space and senior citizen single family residences, then the Committee's third option is the development of Shadow Pines through Cluster Development. The support for each option decreased significantly as the alternatives descended from Option 1 to Option 3.

Option 1 (Preferred):

The Committee recommends that the Town of Penfield purchase the Shadow Pines property to preserve open space and recreational opportunities for the community.

The Committee believes that the best use of the Shadow Pines property is a combination of “active” and “passive” recreational uses and that the Town Board should determine the specific uses based on an assessment of Town needs, financial implications and the potential impact on the adjacent neighborhoods. The following list describes the kinds of uses that the Committee discussed while making our recommendation:

- Lodges/Pavilions
- Playgrounds
- Sports fields
- Trails (foot and/or bicycle)
- Wild space

The above list should not be considered exhaustive nor should it be used to exclude other potential uses that also preserve open space and public recreational opportunities while minimizing negative impact on the quality of life for adjacent neighborhoods. Some members of the Committee also believe that the Shadow Pines property, due to special features (e.g., topography and wooded areas), may lend itself to potential uses that could set this “park” or recreational space apart from others in Monroe County. A toboggan run (such as the one at Chestnut Ridge Park in Erie County) or a zip-line course (such as those operated by Go Ape) were mentioned by committee members. The Committee recognizes that such uses may be beyond the current capabilities of the Town and suggest that the Town consider partnerships with private enterprises.

The Committee also recommends that the best use for the Clark House is as a restaurant, special events facility, or similar and that the Town Board should pursue the sale or lease of the Clark House and adjacent buildings to a private enterprise. Doing so will maintain the Clark House as a resource for the community, minimize the Town’s burden for maintenance of a historic structure, help recoup some of the costs of purchasing the Shadow Pines property, and add to the Town’s tax base (if sold).

The Committee recommends this preferred option after nine committee meetings, many hours of information review and discussion, and careful consideration because open space/recreational use:

1. **Maintains the existing use of the land and the character of the surrounding community.** The property has been in use as a public golf course for in excess of 30 years and was farm land prior to that.
2. **Is in concert with existing plans.**
 - a. The Town of Penfield has highlighted the Shadow Pines property for public purposes for 50 years. The 1966 Master Plan designated part of the property for an elementary school and another section as a Conservation Area (see Attachment 1 image titled *1966 Master Plan Map*). The 1979 Master Plan again identified sections of the property as Conservation/Open space and another section as Recreation space (see Attachment 2 image titled *1979 Master Plan Map*). Most recently, the

2010 Master Plan (current master plan) identified the property as Recreation/Sanctuary land on the Future Land Use map (see Attachment 3 image titled *2010 Comprehensive Plan, Future Land Use Map*).

- b. The 2006 Open Space Plan Update emphasized public access in the future acquisition of open space. The Open Space Update Committee also articulated sixteen criteria for selecting open space to acquire. The Shadow Pines property would seem to satisfy the majority of those criteria, including: few equivalent sites, recreation potential, wildlife habitat, aesthetic beauty, vulnerability to development, water features, cultural/historic, woodlots, steep slopes, and reclamation.
 - c. Since 1984, Dolomite, the current owner of the property, has consistently indicated in publicly available DEC filings that they expected the Shadow Pines property would become a Town park when the quarry is eventually closed. This includes the most recently filed reclamation plan in 2013.
3. **Is in concert with clearly expressed community expectations.**
- a. Community reaction to reports of the potential development of the property was immediate and public comments were overwhelmingly in favor of the development moratorium. This includes virtually all of the speakers at the meeting on March 2, 2016 and 97% of 366 related comments submitted to the Town website.
 - b. All of the residents who spoke at the public information meeting on June 22, 2016 were in support of open space/recreational use, as were 88% of 48 related comments submitted to the Town website.
4. **Minimizes the impact on Penfield School District.** Although the precise financial impact on the school district cannot be calculated, it is widely accepted that most residential housing in Penfield does not cover the cost of educating the associated children. The financial analysis prepared by Penfield School District (see Attachments 4 titled *PCSD Financial Estimate S. Ogie Memo*, and Attachment 5 titled *PCSD Responses to S. Ogie Financial Estimate Memo Questions*) supports the conclusion that construction of houses on the property could create a significant budget shortfall for the district (perhaps in the range of \$1,000,000 annually) requiring a combination of property tax increases and spending reductions.
5. **Does not exacerbate existing traffic issues on surrounding roads.** Traffic on Atlantic Avenue in the vicinity of the Whalen Road and Five Mile Line Road intersection already faces significant backups during peak periods. Clark Road and Huntington Meadow are used as a "cut through" from Atlantic Avenue to Whalen Road and Panorama Trail and do not have sidewalks for pedestrian traffic. The 25 m.p.h. speed limit on Clark Road is routinely ignored with traffic speeds often double the limit. Increased traffic associated with residential or commercial development of the property will add to all of these existing

issues. Furthermore, some members of the Committee expressed concern about egress from the property onto Clark and Whalen Roads given the existing road turns, intersections, and the hill at the intersection of Clark and Whalen Roads.

There are several options for the Town to achieve the uses outlined above, including purchasing the land, purchasing the development rights, and rezoning from residential to recreational use. The Committee endorses purchasing the land as the best of the alternatives.

- Purchasing development rights would maintain open space, but likely would not maintain public recreational use of the land. The 2006 Open Space Update Plan recognized this shortcoming of purchasing development rights and focused on the acquisition of land instead.
- Although the designation of the property as Recreation/Sanctuary in Town Master Plans offers support for rezoning the property, the Committee believes that litigation would be likely with significant cost to the Town and an uncertain outcome.

The Committee recognizes that there are challenges, chiefly financial, associated with this recommendation, including:

1. **Purchase cost.** Information provided to the Committee by Town staff suggests that financing the purchase through a municipal bond would cost Town residents approximately \$194,100 per year for the 25-year life of the bond at a principal amount of \$3,000,000.00. This cost could be somewhat higher or lower depending on the exact purchase cost.
2. **Operating and maintenance costs.** Precise operating costs cannot be calculated until the Town Board determines which uses will be pursued. These costs would be relatively low if most of the land is designated as "passive" open space. The costs would increase as more land is used for "active" uses and/or more structures are built.
3. **Transaction costs.** Purchasing the land requires a public referendum, appraisals, environmental reviews, etc., all of which will require spending on the part of the Town. It is important to recognize these costs, but they are one-time costs that are quite small in comparison to the purchase cost and ongoing operating and maintenance costs.

Option 2 (alternative):

The Town purchases the four Shadow Pines parcels to develop an independent senior living environment featuring significant expanses of green spaces. This would result in a privately owned mixed-use development of single-family homes and open spaces located on the front nine of Shadow Pines. It is anticipated that this option will be attractive to middle and upper income seniors who want to downsize and simplify their housing requirements while maintaining their independent lifestyle. The back nine of Shadow Pines would remain as undeveloped Town owned open space.

The intent is to provide approximately 50 acres of well-designed, seniors-only, cottages, patio homes, and/or town houses combined with approximately 50 acres of low intensity open spaces. This 100 acre development would be located on the current front nine holes of the Shadow Pines golf course with the open spaces concentrated on the western portion in order to buffer the existing residential areas of Clark Road, Skyview Lane and Harwood Circle. The cottages, patio homes, and/or town houses would be located on the eastern portion providing traffic access to Whalen Road. The site could include support facilities typical of a retirement community such as an activity center and swimming pool. A home owners association would be established to provide for maintenance of the structures, roads, and contiguous open spaces. Potential uses of the open spaces might include handicapped-accessible walking trails, community gardens, 4 or 5 senior oriented golf holes, croquet, and bocce courts.

It is expected that the resulting population of independent seniors will provide a sufficient body of clientele to justify re-opening and maintaining the Clark House as a public restaurant and party house.

The approximate 100 acres that comprise the Shadow Pines back nine holes (the area south of Clark and Whalen roads) will remain essentially undeveloped Town-owned open space suitable for low intensity recreational activities such as hiking, bird watching, cross-country skiing. It is anticipated that little or no town maintenance will be required. This area may not be suitable for significant development due to the presence of steep slopes and the lack of suitable traffic access points to Clark and Whalen roads. There is compelling reason to preserve this land for future possible conversion to town parkland when the Dolomite mining and asphalt operations terminate and the quarry pit is transformed into a 150 acre clear-water lake.

Implementation of this option will likely entail:

- a. Conducting a town-wide referendum to authorize the Town to purchase the four Shadow Pines parcels for the intended use as described above.
- b. Using an RFP process to inform and select a suitable developer(s) to purchase the Shadow Pines front nine property from the Town and build out an independent senior living community and open spaces on the front nine parcel in compliance with the Town's specifications.
- c. The Town Board will need to consider and decide the best alternatives for the Clark House and barn. For example, the Town could retain ownership and lease the operations to a suitable restaurant/party-house operator. On the other hand, the Town could sell the property with deed restrictions relating to acceptable uses and maintenance of its historical landmark status.

Anticipated Positive Outcomes:

- Provides some additional property tax revenue to the town with minimal impact on schools, traffic, and town maintenance of roads and grounds.
- Retains a buffer space for the existing residents of Clark Road, Skyview Lane, and Harwood Circle.
- The sale of the Shadow Pines front nine parcel to a developer and the sale or lease of the Clark House will substantially reduce the net cost to the town.

- Having a well-executed independent senior living community on the front nine and Town owned open space for public use on the back nine would provide a significant enhancement to the quality of life for the current neighbors as well as the town-wide residents of Penfield. It is a more desirable alternative than a 255 +/- single-family home development.

Anticipated Challenges:

- There is a chance the referendum fails to receive public approval if the intended use concept is not adequately defined and communicated.
- The Town will need to attract qualified developers to bid on the senior housing component. Prior to any town referendum the Town Board should consider informal contacts with potential developers to determine the feasibility of a joint venture approach.
- The Town Board will need to consider the legal and administrative issues related to the Town's purchase of the Shadow Pines property and the subsequent transfer of the front nine portion to a selected developer(s) for the build-out of the senior living and open space component.
- The Town Board will also need to consider the legal and administrative issues related to the Town's purchase of the Clark House property and the subsequent sale or lease to a private operator.

Option 3 (alternative):

The Cluster Development pursuant to Town Law Section 278 means the allowable number of single family residences allowed by R-1-20 of the Zoning Code without the burden of R-1-20 Zoning Code lot sizes. The result will be to create buffer lands desired by neighbors and as mandated by the current seller.

Whether purchased by the Town or a developer, the Town should drive toward concentrating density and maximizing open space.

The positive points of this option are:

- Maximizing buffers between the new development and existing homes
- Opportunities for developer donations of land to the Town
- Creation of tax producing parcels
- The Town will reap the benefits of incentive zoning which encourage open space opportunities
- Consistent with current Zoning Code
- Minimizes the probability of a lawsuit

The negative points of this option are:

- Increases traffic
- Lowers the tax proceeds based on smaller lot sizes and possibly smaller residences
- Loss of portion of open space
- Increased load on the school system
- Increased load on infrastructure
- Change to the look of the actual property although not to the community
- Inconsistent with the current comprehensive plan
- Contrary to public sentiment expressed to date

Shadow Lake Recommendations

The Committee was also charged with making recommendations related to the future use of the Shadow Lakes property. That property was purchased for continued operation as a golf course after the Committee was launched. The Committee endorses operation as a golf course as the best use for the property. While Shadow Lake is likely to continue operation as a golf course for the foreseeable future (it was profitable prior to its sale and the closure of Shadow Pines golf course reduces local competition), the Town should consider options to ensure future use for open space/recreational in the event the current owners decide to close the golf course or sell the property.

The Committee also recognizes that there may be other properties in Penfield similar to Shadow Pines and Shadow Lake which are also currently zoned residential. Consequently, the Committee recommends that the Town Board:

- Add an open space/recreational zone to the town code.
- Evaluate options to ensure future use of Shadow Lake as open space/recreational. These options include: purchase of the right of first refusal, purchase of development rights, and rezoning from residential to open space/recreational.
- Explore whether action is justified to ensure future use as open space/recreational for other properties in the Town.

There was considerable discussion amongst committee members regarding rezoning Shadow Lake to open space/recreational. The following arguments in support of and in opposition to rezoning were articulated:

Support for Rezoning:

- Ensures future open space/recreational use at minimal cost to the Town.
- Is consistent with Town Master Plans, which lends legal support to rezoning.
- Moratorium was in place when Shadow Lake was purchased and the current owner assumed some level of risk because the potential for rezoning was known at the time of purchase.
- The golf course presumably profitable and there is no indication that economic failure is anticipated.

Opposition to Rezoning:

- Rezoning may impact the value of the property, based on the future redevelopment potential under a different zoning designation than is currently in place on the parcels.
- If operation as a golf course is no longer desirable/viable, the potential to develop the property would be altered. Limiting the future use of private property without compensation may be problematic.
- Despite identification as open space/recreational in the Town Master Plan, it was still zoned as residential. This disagreement leads to a risk of litigation for spot zoning.

At the Committee's final meeting, four (4) of the committee members voted in favor of the rezoning option for the Shadow Lake property.

The Committee focused its effort on the immediate challenge related to Shadow Pines and did not gather sufficient information to fully evaluate costs and benefits related to rezoning and the other options listed above.

WINNEBAGO COUNTY PLANNING BOARD

1966

LEGEND

- AGRICULTURE: LAND USED FOR AGRICULTURE, INCLUDING PASTURE, CROPLAND, AND FORESTED LAND.
- FOREST: LAND COVERED BY FOREST, INCLUDING DECIDUOUS, CONIFER, AND MIXED FOREST.
- URBAN: LAND USED FOR RESIDENTIAL, COMMERCIAL, AND INDUSTRIAL PURPOSES.
- INDUSTRIAL: LAND USED FOR MANUFACTURING, PROCESSING, AND OTHER INDUSTRIAL PURPOSES.
- COMMERCIAL: LAND USED FOR RETAIL, WHOLESALE, AND SERVICE PURPOSES.
- PUBLIC USE: LAND USED FOR PARKS, RECREATION, AND OTHER PUBLIC PURPOSES.
- WATER: LAND COVERED BY WATER, INCLUDING LAKES, RIVERS, AND CREEKS.
- WASTE: LAND USED FOR WASTE DISPOSAL, INCLUDING LANDFILLS AND INCINERATORS.

WINNEBAGO COUNTY PLANNING BOARD

1966

TOWN OF PENFIELD Monroe County, New York

**Figure 1
GENERAL DEVELOPMENT PLAN**

LEGEND

- RESIDENTIAL - SINGLE-FAMILY
- RESIDENTIAL - MULTIFAMILY
- COMMERCIAL - RETAIL
- INDUSTRIAL - LIGHT
- INDUSTRIAL - HEAVY
- AGRICULTURAL
- OPEN SPACE
- WATER
- UNDEVELOPED LAND

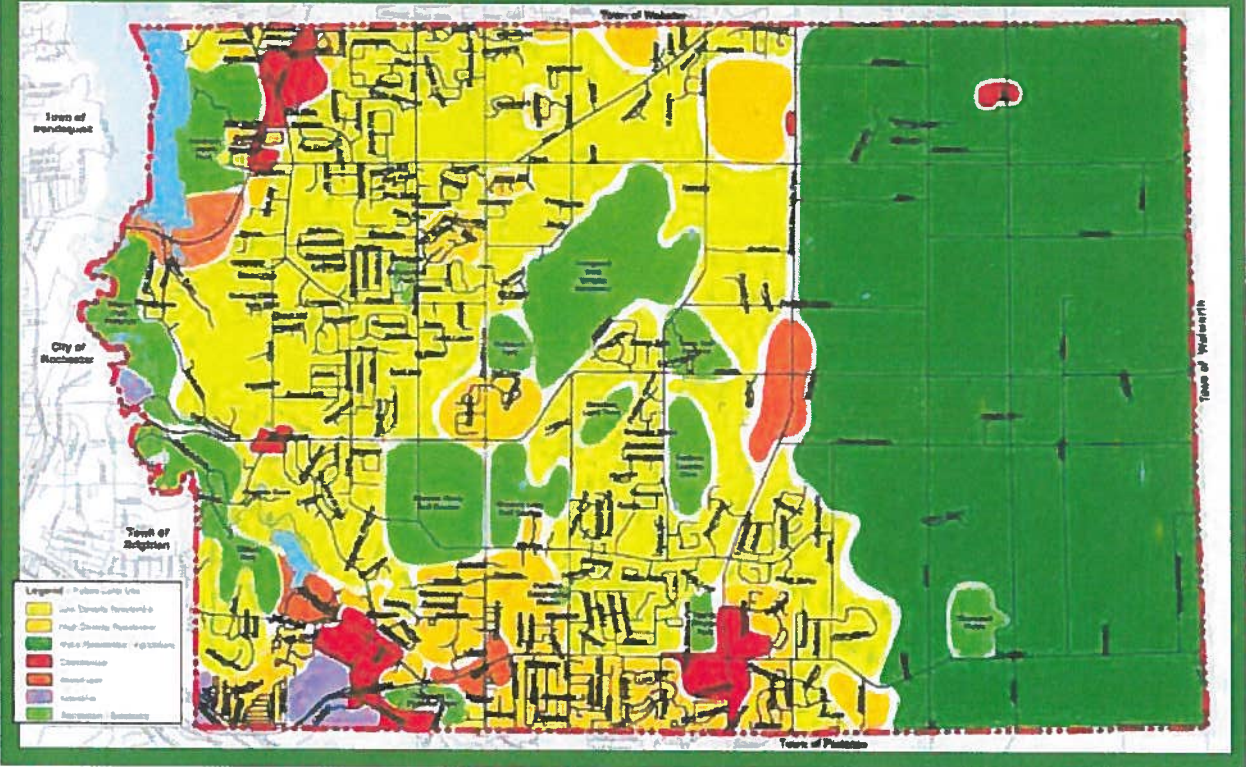
0 100 200 300 400 500 600 700 800 900 1000

1980-1985 1985-1990 1990-1995 1995-2000 2000-2005 2005-2010 2010-2015 2015-2020 2020-2025 2025-2030 2030-2035 2035-2040 2040-2045 2045-2050 2050-2055 2055-2060 2060-2065 2065-2070 2070-2075 2075-2080 2080-2085 2085-2090 2090-2095 2095-2100

Option 1, Attachment 3 titled *2010 Penfield Comprehensive Plan, Future Land Use Map*

Future Land Use

Future Land Use Concept Map



Option 1, Attachments 4 titled *PCSD Financial Estimate S. Ogie Memo*

Thanks to PCSD for developing their estimate of the financial impact of 255 homes on Shadow Pines and for their response to the questions that I submitted. The PCSD financial analysis leads me to the following conclusions:

- The development proposal from Ryan Homes would not generate sufficient tax revenue to cover the increased District costs, yielding a budget shortfall of between \$675k and \$1.9 million dollars annually, according to the PCSD estimates, depending on whether the district accommodates growth through additions to existing schools or builds a new school.
- While the District analyzed the “worst case” if all new students were elementary school age, the District’s analysis also assumes that there will be no growth in administrative costs or other overhead. The cost to existing District taxpayers could be much higher than projected if overhead costs grow significantly.
 - These overhead costs may increase at some point as enrollment grows and development of Shadow Pines will contribute to that growth.
 - PCSD’s 2016-17 budget projects a 0.6% increase in students, but a 1.2% increase in the tax levy and a 2.7% increase in spending. Spending per student is increasing as enrollment grows, not decreasing.
- Based on enrollment and space limitations, the District may choose to build a new school at a much higher cost to District taxpayers in order to meet class size expectations and requirements.
- This budget shortfall would have to be eliminated through some combination of program cuts and tax increases on existing District taxpayers.

Samuel Ogie

Option 1, Attachment 5 titled *PCSD Responses to S. Ogie Financial Estimate Memo Questions*
PCSD Responses in Red Text

Tom,

Thank you for working with your staff to estimate the financial impact on the District of the “baseline” proposal of 255 homes on SP. After reviewing the memo, I have the following questions (ordered from most specific to most general):

1. Is there a rounding issue in the table of Salaries and Benefits? There are three dollar amounts that differ when I calculate them in Excel: General Education Teachers Total Salary (I get \$760,279 rather than \$790,279 when I multiply 13 teachers by \$58,483), Bus Drivers Total Salary, and Bus Drivers Total Benefits. The differences are small for the Bus Driver calculations.

You are correct- there was an error in the table. A corrected table is below:

Positions Needed	Qty.	Average Salary	Estimated Total Salaries	Average Benefits	Estimated Total Benefits	Estimated Total Salaries & Benefits
General Ed Teachers	13	\$ 58,483	\$ 760,279	\$ 23,393	\$ 304,109	\$ 1,064,388
Special Ed Teachers	2	\$ 57,600	\$ 115,200	\$ 23,040	\$ 46,080	\$ 161,280
Special Area Teachers	8	\$ 58,483	\$ 467,864	\$ 23,393	\$ 187,144	\$ 655,008
School Counselor	1	\$ 53,974	\$ 53,974	\$ 21,590	\$ 21,590	\$ 75,564
Psychologist	1	\$ 57,331	\$ 57,331	\$ 22,932	\$ 22,932	\$ 80,263
Teaching Assistants	4	\$ 15,218	\$ 60,872	\$ 6,087	\$ 24,348	\$ 85,220
Bus Drivers	7	\$ 16,786	\$ 117,502	\$ 18,663	\$ 130,641	\$ 248,143
Bus Attendants	2	\$ 9,062	\$ 18,124	\$ 16,757	\$ 33,514	\$ 51,638
Cleaners	2	\$ 27,814	\$ 55,628	\$ 21,384	\$ 42,768	\$ 98,396
Estimated Total Cost			\$ 1,706,774		\$ 813,126	\$ 2,519,900

2. Can the district produce a rough estimate of the additional costs associated with “utilities, administration, maintenance, etc.” for the newly constructed building or classrooms (as noted at the bottom of page 3)? An order of magnitude estimate would be sufficient, e.g., are we talking about \$10,000 per year, \$100,000, etc.

This comment was intended to emphasize the significant additional costs that would come with an entirely new building. For example, an entirely new building would require a principal, clerical staff, cleaners, custodian, furniture, utilities, etc. This would be in addition to the construction costs. It would be significant.

We included the discussion of a new building because we know it has been mentioned during community discussions about Shadow Pines and we thought we should address that possibility. However, unless something else happens, additions to our existing buildings are clearly more feasible.

3. Can the district produce a rough estimate of the additional costs of “supplies, materials, textbooks, and equipment...[and] BOCES services based on the number of students in the District” (as noted on the bottom of page 4)? Again, order of magnitude would be sufficient.

The addition of 300 students would increase our BOCES per pupil costs by about \$102,000. Supplies, material, equipment, etc. would be about \$100,000.

4. Won't there be some expense associated with purchasing, storing and maintaining additional buses? Wouldn't the seven additional bus drivers need additional buses to drive?

Please see the discussion below regarding the overall projection. The seven bus estimate was a worst case based on all three hundred students being at one level (elementary). $300/60$ passengers = five big buses plus 2 mini buses for special needs students. (We estimated 2 special needs classes in the overall mix)

However, we use the same buses to transport elementary, middle and secondary student by adjusting the bell times. For example, in the morning buses transport high school students, then middle, then elementary. If the students end up evenly split between the three levels we could need as few as three buses $300/3=100/60=2$ buses plus a mini bus.

In the short term we would increase our fleet as needed by not trading in during our normal replacement schedule. This is not a long term solution, however. Purchasing the buses would cost about \$115,000 per 60 passenger bus less about \$74,000 in state aid for a net cost of \$41,000 each.

5. Using the numbers in your memo, I calculate a budget shortfall for PCSD of between \$675,000 annually and \$1,890,000 annually (rounded to the nearest \$10k. Is this a correct conclusion?
 - a. Additional classrooms scenario: \$2,160,000 in additional tax revenue, minus \$285,000 local share of building costs and \$2,550,000 in additional salaries and benefits.
 - b. New building scenario: \$2,160,000 in additional tax revenue, minus \$1,500,000 local share of building costs and \$2,550,000 in additional salaries and benefits.

Please see below.

6. Are the salary and benefits costs shown net of state aid? The memo indicates that state aid associated with building has been included, but does not specify for salaries and benefits. If state aid has not been included, is 27% the correct proportion of state aid that the district would expect?
 - a. The memo clearly states that it may take several years to receive increased state aid. Is that applicable to both building costs and salary and benefits?
 - b. If these costs are net of state aid, then the actual budget shortfalls would be larger than shown in the memo for the first several years, correct?
 - c. I seem to recall either you or John Piper telling me that state aid is relatively generous for building costs as compared to operating costs. This suggests that aid for salaries and benefits would be significantly lower than 27%.

The state aid system is complicated. There is state aid directly tied to capital costs for buildings and for bus purchase. There is also expenditure based aid for certain categories such as transportation (transportation costs including salaries are aidable) and BOCES. However, instructional salaries are NOT directly aidable. Rather, instructional costs are aided through a block grant type formula (Foundation Aid). This formula is based on numerous factors including pupil counts.

However, Foundation Aid has been frozen based on the state's fiscal condition for several years. Therefore, while it is possible that the additional students from Shadow Pines could generate additional foundation aid sometime in the future, it would not be wise to count on it.

The estimates above have taken the aid for the capital costs into consideration.

7. Can we flex these numbers for differing numbers of students? Clustering, mixed use, and other potential development options will yield differing numbers of additional students. We will need to have some basis for estimating the financial impact of differing numbers of students. I attempted to do so myself and came up with the following budget shortfalls using the additional classrooms scenario: \$570,000 for 260 students, \$525,000 for 220 students, \$381,000 for 140 students. See attached spreadsheet for details.
 - a. I calculated \$7,367 in tax revenue per student (base case \$2,210,000 for 300 students), multiplied by the number of students and subtracted \$50,000 in existing taxes in each scenario.
 - b. I calculated the number of students per position in the memo table (e.g., 13 General Education Teachers for 300 students yields 23.1 students per General Education Teacher) and used this as a guide for reducing the number of positions required as the number of students decreased.

Our intent with the discussion above was to use 306 ELEMENTARY students as a worst case scenario to explore possible costs in a simplified way. The reality will be a mix – some of the 1.2 students per household will be middle and high school students. Some families will choose private schools. Secondary students will have much smaller marginal costs – no construction would be necessary to accommodate additional students at Bay Trail or the High School. Increased secondary enrollment would be spread over numerous core courses and electives. While class sizes could rise, it is difficult to predict.

However, the mix will be important. Consider this alternative:

Private:	10
Pre-School:	20
Elementary:	92
Middle:	92
High:	92
Total:	306

With this fact set the Shadow Pines development would require about 5 new classrooms (rather than the 15 in the “worst case” scenario. Buses and drivers would be reduced. The tax revenue would not change. Further, with a smaller student load we may not need to add counselors or psychologists – the case load would increase.

To prorate –

Each new elementary class would require a 1.0 FTE Teacher

Each new class would require .2 each of 3 Specials (Art, Music and PE) for a total of .6 FTE

Our identification rate for Special Education services is about 6% - Some of those students will have mild disabilities, some will be more involved. A self-contained special education classroom could contain 12 students, 1 teacher, and 2 teaching assistants.

8. This analysis shows purely incremental costs, is that correct? That is, the costs shown here reflect costs associated with personnel and facilities in direct contact with students? If so, a more realistic estimate of cost to District taxpayers would be higher. What would the cost estimates be if the District's fully allocated cost per student were used (all District costs less associated state aid)?
 - a. The Shadow Pines development is not happening in a vacuum. The D&C reported (May 19th) that Penfield is one of the fastest growing towns in the county (only Henrietta and Webster growing as fast). Unless the District has reason to believe that this is likely to change, then we must assume that other development will follow Shadow Pines.
 - b. Overhead costs typically behave like step functions, i.e., over some range of quantity variation they are fixed, but eventually they will have to be increased. Although an individual project may not require additional overhead, it does reduce the capacity of the existing overhead and shortens the time until additional overhead must be added.
 - c. Fully allocated cost estimates reflect the reduction in overhead capacity associated with an individual project. Assuming that there are economies of scale (e.g., the District needs only one Superintendent, one Finance Director, etc.) then fully allocated cost provides an upper bound. Alternatively, a few truly fixed costs can be subtracted from overhead when calculating fully allocated cost per student.

You are correct, this analysis shows purely incremental costs. We tried to be fairly conservative regarding those estimates – we assumed a worst case scenario and aimed high on some of the other costs, cleaners, bus drivers, etc. As our schools continue to grow from this and other developments there will be new overhead costs – the conception of a “step function” is spot on. For example, increased students could lead to increased nursing staff, clerical support, etc. However, we were focusing on the addition of the 300 students from this single property.

9. Is it correct to conclude that the budget shortfall would have to be eliminated through some combination of tax increases on existing District taxpayers and budget cuts? The memo references the tax cap and seems to suggest that a significant proportion of the shortfall would have to be reduced by budget cuts. Is that correct? Which budget cuts would be most likely if the District was forced to rely on budget cuts to eliminate the budget shortfall?

Yes, if the property generates costs in excess of the revenue generated, the only two choices are budget cuts or tax increases. As discussed above – this will ultimately depend on the number and mix of the students. However, timing is also very important. If all 300 students arrive in one year (unlikely) the impact would be greatest and the available options would be limited. If the development is spread out in phases, the longer development time would allow greater choices and could mitigate the impact. Because of the large number of variables, it would not be prudent to forecast specific budget cuts based on hypotheticals.

Regards,

Sam

Town of Penfield

Shadow Pines Land Use Advisory Committee

Final Report to the Penfield Town Board

Date Submitted –April 17, 2019

A. Committee Members

Beth Barrese	Tricia Bhattacharya
Steve Brent	O. Terry Bruce
Susan Kavanagh	Kelly Maley
Ginny McCollough	Eric Metzler
Bob Peterson	Lance Seeber
Jeff Taddeo	Ryan Teeter

B. Facilitators

Supervisor R. Anthony LaFountain
Councilman Andy Moore

Technical Assistance and Information Provided by Town Staff

I. Background Information and Committee Overview

In early 2016, Shadow Pines Golf Course was placed on the market for sale as continuing golfing operations or as currently zoned, half-acre residential development.

On April 6, 2016, following an open call for volunteers, the Penfield Town Board named a citizen advisory committee to identify and review all land use options for the Shadow Pines Property ("the Property"). The committee was referred to as the Shadow Lake/Shadow Pines Community Advisory Committee.

That advisory committee submitted its final report to the town board on September 2, 2016 with a first choice recommendation that the Town of Penfield acquire the Property.

After ongoing discussions and negotiations between the Town and the Property owner, Oldcastle, a purchase agreement was signed conditioned on a successful public referendum vote to acquire the land for general municipal use, which was held on February 27, 2018 and overwhelmingly approved by 80 percent of voters.

The Property was closed on April 27, 2018, and shortly thereafter the Town's DPW began removing dead, dying, and diseased trees and other debris around the Property north of Clark Road with the plan to open the land for hiking in the late summer/early fall of 2018. Accordingly, the north Property was officially open to the public on September 1, 2018.

Following the same level of cleanup of compromised trees and debris by the DPW the land south of Clark Road (former back nine) was officially open to the public on February 1, 2019.

The Shadow Pines Land Use Advisory Committee (the "committee") was formed in July 2018.

Over the course of the last several months, the committee has toured the Property, shared information, discussed ideas, and reported back to the Penfield Town Board with its final recommendation on or before April 9, 2019 with findings on possible land uses and how each use might be supported, implemented, and funded.

The committee is made up of a cross-section of Penfield residents and supported by Town staff. Subject matter experts were brought in at the request of the committee. Additionally, the committee requested groups/organizations within the community to share their thoughts/proposals for the committee's consideration.

The committee has worked in parallel with the Comprehensive Plan 2020 Update Committee and the Penfield Recreation Master Plan Update committee and is mindful that the work of these committees may affect potential land uses at the Property. Town staff has and continues to monitor both groups and share relevant information between committees as needed.

II. Committee Charge

The Penfield Town Board charged the committee with studying and issuing a written report on the following attributes for the Property.

- (1) Identify:
 - a. Land use opportunities/options
 - b. Land use constraints

- c. Community suggestions for use
 - d. What the community does NOT want to see
- (2) Findings for each possible land use should include:
- a. Description of land use
 - b. How use would be supported
 - c. How use would be funded
 - d. How use would be implemented
 - e. Opportunities and constraints

Items NOT on the table for consideration include:

- a. Future use of the quarry
- b. Town-operated golf course
- c. Clark House

Resources for committee members.

- a. Town Code of the Town of Penfield
- b. Town of Penfield plans and studies
- c. Shadow Lake/Shadow Pines Community Advisory Committee Report, 09/02/2016
- d. Solicited public input via email, the town website, and mailed letters
- e. Public information meeting held on 11/13/2018
- f. Access to subject matter experts

III. Community Comments Collected for Land Use Recommendations

On November 13, 2018, a public information meeting was held in the Town Hall Auditorium to allow the public an opportunity to present thoughts and ideas for future use and development of the Property. The input collected from the public information meeting was transcribed and provided to the committee for its review and evaluation.

Following the public information meeting, a public comments webpage form was activated on October 22, 2018 on the Town's website (www.penfield.org) to allow residents to submit comments electronically for the committee's review and evaluation. The webpage form was permanently closed on December 17, 2018. The comments submitted by the public via the webpage form were compiled and presented to the committee for its review and evaluation.

Several public comments were submitted via email and mailed letters to various departments. These were processed and submitted to the committee for its review and evaluation.

The committee spent several meetings discussing and evaluating the land use recommendations submitted by the community and listening to presentations by interested parties such as Penfield Recreation, Genesee Regional Off-Road Cyclists, and Paul Sanders, PGA. Over the course of those meetings, the members shared views and through a process of open discussion formed a consensus for the recommendations contained in this Final Report.

IV. Executive Summary

The 212 acre Property is a unique open space that has well served the Penfield community and regional visitors since opening in 1985 as a public golf course and restaurant. This valuable open space asset is centered in the predominately residential southwestern portion of the Town of Penfield. Shadow Pines, the Dolomite stone quarry, and Shadow Lake Golf Course to the east of the quarry, when taken together, form an important tract of land whose future land use has been envisioned as Recreational/Sanctuary in the Town of Penfield 2010 Comprehensive Plan's Future Land Use Concept Map (Figure 1).

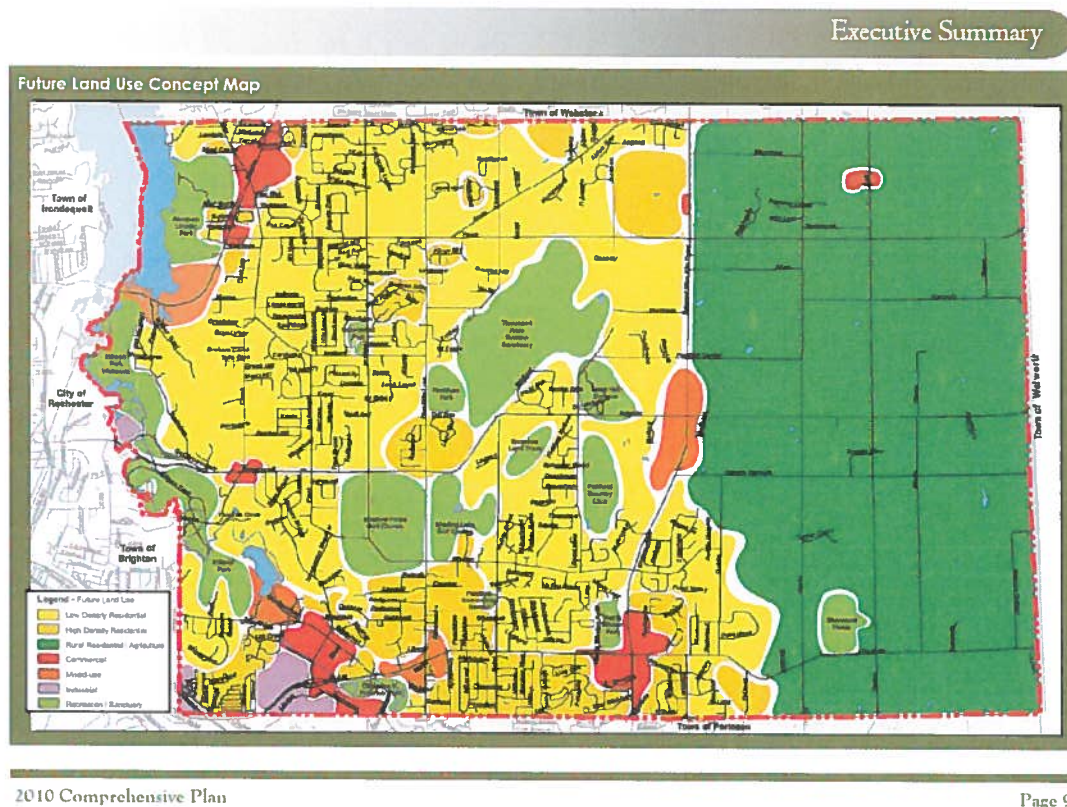


Figure 1 - Future Land Use Concept Map

In September 2016 the Shadow Lake/Shadow Pines Moratorium Committee recommended the Town purchase Shadow Pines to preserve open space and the best use of the Property as a combination of “active” and “passive” recreational land. On February 27, 2018 a public referendum vote was held to authorize the Town’s purchase of Shadow Pines and the Clark House. The purchase was approved in a large turnout of nearly 7,000 residents with 80% voting in favor.

The vision portrayed in the Town’s Comprehensive Plan - that the Property be preserved as recreational or natural open space - is strongly endorsed by the residents of Penfield. This desire to preserve valuable open space was always in the forefront as the committee reviewed the various proposals and developed a consensus for the best compatible land uses.

Based on the February 27, 2018 public referendum vote of the residents to authorize the Town's purchase of Shadow Pines and the Clark House, the Town has acquired the land and through proper vetting of applicants, appointed the committee, made up of town residents, to provide recommendations for the best possible use of this 212 acre Property known as Shadow Pines. On November 13, 2018, a public hearing was held, whereby the residents offered suggestions and input as to how they would like to see this land best utilized for future preservation. In addition, residents were invited to submit comments and suggestions via website input, and emails to the Town. These comments overwhelmingly supported preservation of the Property as open space. The most common theme heard in the public information hearing an endorsement of preservation and allowing the land to remain as open and natural as possible, while offering a variety of recreational resources and activities that would be attractive to the community, without tremendous disruption of sanctuary land. The committee has carefully reviewed and taken all of the comments and suggestions that were provided into consideration in the last several months. Members of the committee had a guided tour of the Property on October 16th & 20th, 2018. This tour provided us with a clear analysis of the landscape and aided us during the discussion phases. We have also extensively reviewed the Moratorium Committee's recommendations and have worked together to develop this best use comprehensive report for the Penfield Town Board, to aide in the long-term planning for Shadow Pines.

The interdependence of potential business operations at the Clark House and recreational activities on the Property was apparent to the committee. However, since the Town Board was already in the process of publishing a formal Request for Proposals for lease of the Clark House, the committee does not make any recommendations regarding best use. The one exception is the committee recommendation that the cart house structure be considered for use as a lodge/restroom facility. Also, consideration of rezoning the Property to protect the open space & recreation aspects was deemed unnecessary by Town Staff. The Town retains ownership control of the Property and zoning options will be considered by the currently empaneled Comprehensive Plan 2020 Update Committee.

With the above as background, the committee recommends the following overarching factors be taken into consideration by the Town Board, when making land use decisions for the Property:

- Residential and/or commercial development should not be considered and instead the focus should remain on recreational activities.
- Facilities such as a new community center and public library are not conducive to the open space objective.
- Municipal uses such as a school bus garage or maintenance operations are incompatible to the preservation of open space and should not be considered.
- Flexibility should be employed when incorporating recreational uses of the Property. The Town Board should carefully weigh what impact implementation will have on the longevity of the land. If various recreational activities, or potential structures, are not popular or underutilized, there should be reasonable consideration given to turning that space into something more beneficial for the community.
- Before transforming natural open space into fully equipped party lodges (e.g. Dolomite Lodge), all other potential locations should be considered. Benches, picnic tables with open pavilions and rustic lodges are desirable.

- Providing handicapped access to undeveloped open space is recommended to truly make this space accessible and attractive to the general public.
- Gas and electric motorized recreational vehicles operated by the general public, drones and toys powered by remote control should not be allowed on the Property.
- Fences, especially chain-link or wire mesh fences, are not attractive and should not be utilized to segregate space.
- Sidewalks and access points for the surrounding neighborhoods and dense traffic areas (such as the corner of Whalen Road and Atlantic Avenue) should be considered to provide easier and safer access onto the Property.
- The inclusion of a pedestrian activated walkway is recommended to link the North and South portions of the Property (across Clark Road) for safety purposes.
- Replanting programs to replace damaged and diseased trees or to enhance existing open spaces are recommended.
- The town should allow fundraising or benefactor contributions and investments for dedication of benches, bricks or other small practical articles of interest.
- The remaining original golf course tee markers that remain in the Town's possession should be utilized as landmarks along the Property, where possible.
- The Dolomite stone quarry will eventually be reclaimed as a large clear water lake suitable for paddling, fishing, and scuba diving. Since it is situated just across the road from the Property, a point of access should be reserved on the south section in anticipation that this recreational asset will be made available for use by the general public.
- Proper signage regarding land usage, Property rules and details regarding Shadow Pines history should be added for general public information.

Based on all of the above, the committee presents the following for consideration to the Town Board as our recommendation for short and long term best use of the Property. We thank the Town Board for this opportunity to assist in planning the future use of this spectacular open space.

V. Land Use Recommendations

Paths and Trails

Multi-Use Paths

The committee recommends that existing cart paths on both the south side and the north side be used for multiple applications.

North Side (Former Front 9)

- The cart paths should be maintained for handicapped accessible use wherever possible.
- Remaining cart paths should be used in a perimeter loop path that would connect them for walkers, hikers, runners, and other foot traffic applications. Suggest former golf holes 3-8 or 9.

South Side (Former Back 9)

The existing primary asphalt cart path loop, should be made available for individual and family biking and all foot traffic activities. Modifications may need to be made on the sharp hillside near the creek bridge to increase safety of trail users.

A network of multi-use, natural surface trails should be developed on the back 9 with the intention that the secondary cart paths will eventually deteriorate back to natural surface trails. Trails would support all types of biking and foot traffic activities in both summer and winter.

Snowshoeing

The committee recommends the town allow snowshoeing on the Property anywhere established trails exist as well as off established trails. Signage should be added to groomed ski trails to demonstrate the correct part of the trail to use so as not to damage groomed ski tracks.

Cross-Country Skiing

The committee recommends the town establish a network of groomed ski trails on both the former front 9 and back 9. Trails should include a range of skill levels as well as trails wide enough for skate skiing and classic tracks alongside an area for snowshoeing, walking, and snow (fat) biking.

Mountain Biking

The committee recommends that mountain biking be allowed on designated trails on the south side, and that fat/snow bikes (with 4+” tires) be allowed on groomed trails in the winter months.

Funding

The town should establish a budget for establishing/maintaining paths and trails. This can be supplemented by fundraising and volunteer labor and materials provided by partner groups.

Implementation

To build and design trails, the town should utilize Penfield DPW resources and the Penfield Trails Committee. Local trail user groups such as the Rochester Cross-Country Ski Foundation (RXCSF) and Genesee Regional Off-Road Cyclists (GROC) with expertise in building hiking, biking and skiing trails should also be consulted.

Other local organizations are available with expertise in developing multi-use trails and can be valuable resources such as the Town of Victor and Friends of Webster Trails.

Trails should be built using sustainable techniques to avoid erosion, limit maintenance and increase enjoyment for years to come.

Opportunities

Overall, Shadow Pines provides a tremendous opportunity for Penfield to establish a much-needed town center for hiking, biking, walking, running, skiing, snowshoeing and other human-powered activities. These resources are essential to many residents for exercise who do not or

cannot participate in organized or paid activities/sports.

The work required to install trails provides a great opportunity for local Eagle Scout projects and other local service groups to participate in construction.

Grooming services should be provided by the town by contracting with RXCSF or the school district for expertise and equipment.

Many trails through or on the edge of open fields can be installed just by mowing marked path. This will need to be done more regularly until the trail is more established by use. Once it is more established mowing may only have to occur 1-2 times per year.

Some trails in more wooded areas will require clearing of organic materials (leaves, downed sticks/branches/trees), breaking/moving of large rocks, and digging trail tread in off-camber areas.

Constraints

Asphalt paths will need to be maintained at the expense of the town. Maintenance of back 9 cart paths with the exception of the primary loop, should be minimized to allow natural surfaces to return.

Education

Education is important to trails that are shared by many users. Signage should be installed at all trailheads that includes trail maps and guides for trail etiquette.

Signage such as the following can be used to direct winter trail users:



Figure 2 - Groomed Trail Etiquette Sign Example

<http://www.skibigm.org/uploads/1/5/5/9/15591998/editor/winter-singletrack-arrow-and-etiquette-final-jpg.jpg?1513384834>

Most trail systems require bikers to yield to all other trail users and use signs like this:



Figure 3 - Trail User Yield Sign Example

<https://image.shutterstock.com/z/stock-photo-bethesda-md-october-bikers-yield-to-pedestrians-street-sign-729737587.jpg>

Athletics

Description of land uses

The committee sees this Athletics option as evolving over time, as they do not all have to be implemented, nor is the town limited to the list. These options were seen as favorable because they were consistent with the most requested community desires. For example, both an orienteering course and/or athletic fields would still allow for green, open space during the fall/spring/summer months and enable the Property to be used for cross country skiing trails, snow shoeing or other activities during the winter. Athletic fields were also listed as a preferred future use/redevelopment by the Shadow Lake/Shadow Pines Community Advisory Committee (submitted September 2, 2016), allowing consistency with our recommendations.

Most of these options allow for the Property to maintain the character of the land, while also enabling changes to be made as the town may evolve in the future. In addition, the 1979 Master Plan for Penfield identified this area to be used as Conservation/Open space, as well as Recreation space. Again, Athletics allow for the Property use to remain consistent with our heritage.

Of note, all the options listed above must include Property maintenance. The features discussed in this section will require properly maintained grass areas where the features are located.

Orienteering Course

The committee recommends an orienteering course as an inexpensive activity which needs little upkeep and investment. Orienteering is an activity that requires navigational skills using a map and compass to navigate from point to point in diverse and usually unfamiliar terrain whilst moving at speed. Participants are given a topographical map, usually a specially prepared orienteering map, which they use to find control points. We recommend working with local Boy/Girl Scout troops to develop and maintain the course, in conjunction with the Rochester Orienteering Club.

Athletic Fields

Individual members of the committee did discuss athletic fields with Penfield Recreation (PR) and the committee does recommend athletic fields for the Property. Athletic fields would be rectangular fields, to be used for sports such as (but not limited to) lacrosse, soccer, and field hockey. Currently, PR lacks areas for new fields to keep up with the growth of the community and youth sport popularity. The committee recommends working with PR closely to determine the number of fields needed, for current needs and future growth. Any fields should be incorporated into the Property such that they do not alter its character. The committee does not support the idea of a large-scale athletic field complex. The fields may be phased in as time dictates and funds allow.

Playgrounds

The committee recommends playgrounds be built in the proximity of pavilions and bathrooms on the Property. Playgrounds were also in the top 10 ideas for the Property when looking at public comments for usage ideas, are attractive to families with small children, and would not occupy a significant amount of the Property, therefore maintaining the desire for open space. See Facilities (below) for recommendations of pavilions and bathrooms.

Volleyball/Bocce/Non-fenced, hard surface

The committee recommends the town allow for volleyball/bocce or other activities, as they do not require fences or any hard surfaces. Some accommodations may be needed for the surfaces required for these activities (i.e. sand).

Ice-skating rink (not walled)

The committee recommends an ice-skating rink that does not need any permanent construction to create. The simplest solution would be flooding a new parking area or some other designated area that has the ability to contain water and create ice suitable for skating. However, it is recommended that the structural impact of water and ice is looked at prior to moving forward.

Frisbee Golf (Disc Golf)

The committee recommends the town allow frisbee golf in some capacity, whether it be 'pop up' tournaments or at some point, designating some land for more permanent holes. More information would be needed on land requirements for this activity, but we do not see a reason to exclude this as a possibility for the land.

Spray Park

The committee recommends the town to allow a spray park on the Property if financially feasible. Just as a playground, this feature is also attractive to families with small children and would also require only a small portion of the land. It is recommended a more in-depth examination into this option be done to better understand the requirements (water drainage, costs, water accessibility).

Possible Funding or Financial Support for Land Uses

The funding required for the land uses listed above will vary, and the committee does not know the cost implications of any use. Land grading would be necessary for athletic fields and some of the other activities as well. The committee recommends the Town of Penfield provide the machinery and/or labor needed for maintenance and grading, where appropriate and possible.

Implementation of Land Uses

Overall, the committee understands that not all activities listed above are necessary. From an Athletic fields perspective, Penfield Recreation and the Parks Dept. should be consulted to determine the number of fields needed in order to satisfy town requirements.

Opportunities and constraints

Shadow Pines presents an outstanding opportunity for Penfield to establish an area designated for outdoor activities, serving a wide range of our residents. As the town continues to grow, the committee believes these activities will help serve both our current and future needs. The uses listed will also keep the land in a natural state, keeping the open space which was so often desired during our research and feedback sessions.

A possible constraint is the space needed for parking and a blacktop surface that does not already exist. Current parking lots are insufficient for the number of spaces needed for the athletic fields and other recreational activities. Access to the parking lot must also be examined to determine the best enter/exist points with the traffic associated with the roads.

Facilities**Restrooms**

Restroom facilities should be provided to support the recreational activities on both the north and south sections. In order to conserve open space and minimize new development, it is recommended that existing buildings be used for this purpose. The Clark House cart house (Figure 4) on the north side and the maintenance shed (Figure 5) on the south side are preferred locations. These two facilities may be used for other purposes (e.g. enclosed lodge or equipment storage) but restrooms with outside access would be a useful added feature.



Figure 4 - Cart House



Figure 5 - Maintenance Shed

Pavilions/Shelters & Picnic Tables

Open pavilions/shelters (Figure 6) covering a space to accommodate six to eight picnic tables each are recommended. Initially one each on the north and south sections should be considered. Additional pavilions can be added if demand warrants. Charcoal grills and waste containers should be co-located. The challenge is to locate the pavilions within reasonable distance from parking and restroom facilities without requiring substantial new paving and still respect the 200 ft. buffer zone. Stand-alone picnic tables should be considered for locations adjoining organized activity areas such as playgrounds and athletic fields. Randomly located stand-alone picnic tables are not recommended. Benches are recommended to be located at appropriate scenic sites and alongside paved pathways. A gazebo (Figure 7) could also be situated alongside the paved pathways providing handicapped access.



Figure 6 - Pavilion/Shelter



Figure 7 - Gazebo

Enclosed Lodges

One enclosed lodge on each of the north and south sections should be considered. These should be focused on supporting recreational activities such as hiking and cross country skiing. They should provide a dry, warm (in winter) gathering space for families providing the basic amenities such as water, restroom, electric stove and/or microwave oven and operate in a carry-in/carry-out mode. For starters, it is recommended that the cart house be modified to satisfy this purpose on the north section. If demand warrants, a rustic style lodge (Figure 8) could subsequently be constructed in a suitable location on the south side. The included restrooms should provide interior and exterior accessibility. Fully equipped party lodges (aka Dolomite Lodge) are considered undesirable for the Property.



Figure 8 - Rustic Lodge

Camping Sites

Overnight camping sites are not recommended. It is expected that the Property will close in accordance with the Town Ordinance.

Festival Site/Farmers Market

If sufficient interest develops, a festival site or farmers market could be located in the existing former golf course parking area.

Possible Funding or Financial Support for Land Uses

Funding for materials and construction of a gazebo, pavilions, and benches could be partially sourced through donations and memorials with naming rights. Such an approach will provide a good opportunity for individuals and community groups to be involved in the implementation of substantial improvements to the site. On the other hand, construction of restrooms and lodges will require a more substantial capital investment. In this case, the Town Board will need to follow established procedures for reviewing, approving, budgeting, and allocating the funds. Ongoing operations and maintenance of lodges and pavilions can be fully funded by rental fees.

Opportunities and Constraints

The implementation of benches, pavilions, lodges and gazebo offer appealing opportunities to have community support groups and individuals involved in helping to develop Shadow Pines into an attractive, welcoming multi-use recreation area. For instance, community action groups might be interested in fund raising and public participation in building a rustic lodge. BOCES or scout troops might be interested in building a gazebo. Individuals will probably be interested in donating memorial benches.

There are several stone golf course tee markers (Figure 9) stored in the cart house which would make nice reminders of the Shadow Pines history. These could be located at appropriate sites along the trails and paths or perhaps reconfigured into a monument at the main entrance.

Remodeling the cart house into a lodge for the north side should be comparatively easy considering the availability of existing structure, infrastructure, and parking. On the other hand, building a rustic lodge on the south side presents significant challenges relative to providing electric, water, sewer, gas, and parking infrastructure.



Figure 9 - Tee Markers

Aesthetics and Buffers

Descriptions of Land Usages

This committee considered the opportunities, options and constraints presented in the land usages listed above. We factored in the messages from the referendum outcome resulting in the town's authorization to purchase the Shadow Pines Property, the community's suggestions for its use as articulated in a public hearing and in messages, all urging the preservation of the Property and its natural beauty for public recreation and enjoyment. Accordingly, our approach has been to promote usages in ways that preserve the natural beauty of the Property while encouraging activities consistent with these values while honoring the right of adjacent Property owners to quiet enjoyment of their properties. We also sought to minimize the cost of improvements to Penfield tax payers.

Vegetated Buffers

Overview:

As shown in the Shadow Pines Boundary Map of September 2017, (Figure 10), and which we confirmed by onsite inspection, many private residences abut the Property along Colonial Drive, Arrowhead Lane, and Sawmill Drive on the southeast; High Meadow Drive on the south; Mountain Road, Huntington Meadows, and Clark Road on the southwest; Skyview Lane, Harwood Circle and Atlantic Avenue on the northwest; and on two adjoining properties on the south side of Clark Road west of the Clark House.

Along Colonial, Arrowhead, Sawmill and High Meadows, the Shadow Pines borders are already thickly wooded. High Meadows has a thick buffer and is on a ridge above the Property. There is also a wooded buffer along Mountain Road, where the properties are also on a ledge. The Shadow Pines border along Huntington Meadow and just south of Clark Road, is also heavily wooded. The two adjacent properties further east along Clark that extend south forming an inverted L shape are in areas with breaks in the woods but not near the old golf cart paths.

Along Skyview Lane, and Harwood Circle, buffer is relatively thin and parallels a nearby golf cart track.

There are no large open areas where ballfields or other places are likely to attract many visitors near adjacent residential properties. Except along Harwood Circle and Skyview Lane, there are no cart paths near residential properties. At this early time, when anticipated hiking, skiing, and

bicycle paths are planned exclusively on the paths of existing golf cart paths, there seems to be little need for additional buffers except perhaps in the Harwood, Skyview area.

When development plans progress, however, the need for additional buffers may arise. In that case, adjacent residential Property owners should be allowed to request them. If the request is determined well founded, the Town should either provide the buffer at its own expense or share the cost with the Property owner.

Because organizations such as the National Arbor Foundation, the New York State Department of Environmental Conservation and perhaps others may provide the trees or shrubbery at no or minimal cost (see below) and perhaps civic organization, like the Boy Scouts or Girl Scouts, would volunteer to do the planting, costs will probably be minimal.

Where there will be a cost, an issue arises whether the town or the adjacent homeowner should be responsible. One possibility is for the Town to offer a basic buffer, but give the adjacent owner the option of obtaining a more elaborate one with the owner responsible for the additional cost.

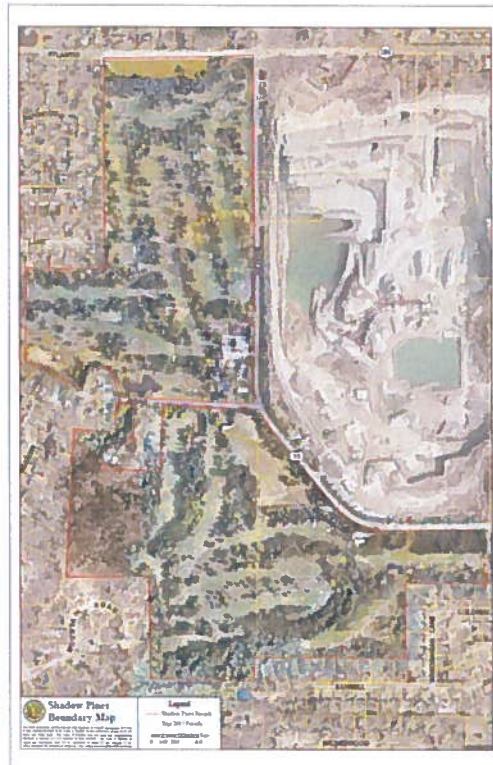


Figure 10 - Shadow Pines Boundary Map

Representative types of ground cover and their recommended environments:

Moderately Wet to Wet

Arborvitae

Evergreen. The biggest issue is the deer browse, so establishment may be difficult in the first few years.

Wet Areas

Red Osier Dogwood

Sun to partial shade. Moist, well-drained soil to seasonally wet soils. Will grow in wetlands

Northern Spice Bush

Grows 8-10 feet

Ostrich Fern

Grows 4-6 feet

Buttonbush

Sun, moist to wet soil. Will grow on well-drained sites with adequate moisture. Often found in cattail marshes and pond shorelines

Dry Areas

Sumac Tree

Deciduous variety has striking fall color; also evergreen varieties

Ninebark

Sun to partial shade, does well in a wide range of moisture conditions.

Nannyberry

Sun, moist well-drained soil. Will tolerate wide range of soil types including limestone soils.

Grey Dogwood

Sun to light shade, well-drained to moist soils. Quite drought tolerant.

Northern Bayberry

Sun to partial shade, moist, well-drained soil. Tolerant of a wide range of soil types.

Bristly Locust

Sun, medium to dry soils.

Most if not all of the species listed above are available through the NYS DEC Saratoga Tree Nursery (<https://www.dec.ny.gov/animals/75799.html>). Since there is also at decent sized tributary through the Property we may be eligible for Trees for Tribs grant program (<https://www.dec.ny.gov/animals/77710.html>). Another potential source of materials may be local nurseries, which may contribute in return for recognition of their contributions.

Avoid

Buckthorn and any bamboo, which is not native and drives out other species.

We acknowledge and thank Dick Adamus of Penfield and Jeremy Paris, Monroe County Soil and Water Conservation District Technician for their suggestions about particular kinds of ground cover and possible sources of it.

Sidewalk Access

There are three places we deem suitable for the construction of access additional points.

One is on the west side of Five Mile Line, between Colonial and Whalen near the old 12th hole green (Figure 11). Another is on the south side of Atlantic Avenue near Whalen opposite the old fourth hole. The third is on the north side of Clark Road west of Huntington Meadow.

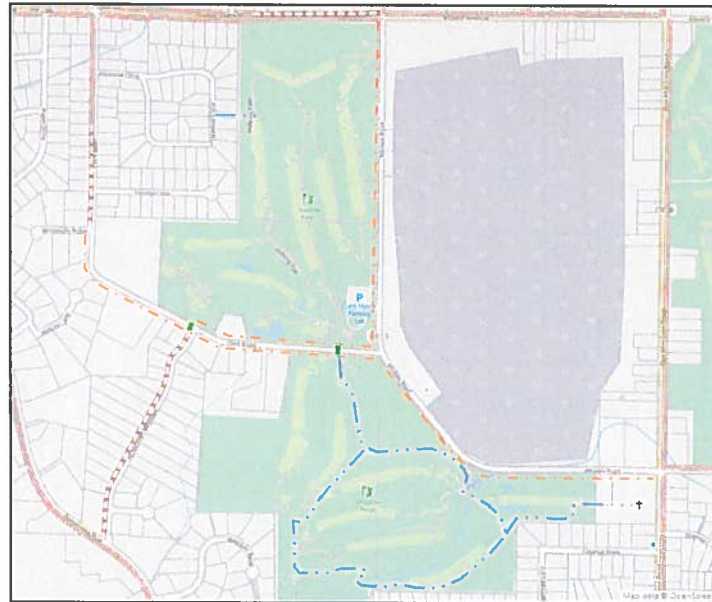


Figure 11 - Conceptual Map for Pedestrian Accessibility

Figure 11 shows potential sidewalk connections along Clark Road and Whalen Road (dashed orange), with possible crosswalk locations (dashed green). Also, shows the recommended primary trail loop on the south side of the Property along and possible trail connections from Harwood Circle and 1957-1959 Five Mile Line Road (dashed blue).

All three would require the construction of paths intersecting the Shadow Pines trails.

We do not believe new parking lots would be necessary in any of these access points because they would probably be used mainly by residents living near them.

The paths should be about the width and quality of the principal paths.

Grounds Keeping and Lawn Maintenance

Preserving open spaces will require regular maintenance because bushes and trees swiftly regenerate unless they are actively prevented from doing so.

In those places such as ballfields and picnic areas where it is desired to maintain the Property as grass, it will be necessary to mow regularly, probably at Town expense because it is unlikely we could find volunteers for such as recurring task.

There may be other large open areas not necessary to be maintained as grass. Such areas should be bushwhacked a few times a season, at far less cost than regular mowing.

Incidentally, to keep the paths fully functional an area of about 10 feet on both sides of each, they should also be bushwhacked periodically.

VI. Land Uses Not to Be Considered

Based on public comment and input received, the following describes the committee's findings for types of land uses that are not recommended for the Property.

Facilities

Description of land uses

The following proposed uses had very little public support and are out of character with the open space attributes of the Property. We therefore recommend against implementing any of the following land uses:

- New community center
- Penfield Recreation center
- Swimming facility (indoor/outdoor)
- Penfield Public Library
- 10 acres for PCSD Transportation Dept. and Grounds facility
- Solar field
- Community Garden

Reasons for not recommending for implementation

The 212 acre Property site is a unique open space and recreational area that has well served the Penfield community and regional visitors since opening in 1985 as a public golf course and restaurant. Shadow Pines, the Dolomite stone quarry, and Shadow Lake Golf Course to the east of the quarry when taken together form an important tract of land whose future land use has been envisioned as Recreational / Sanctuary in the Town of Penfield 2010 Comprehensive Plan (Figure 1). These proposed building projects are expensive, environmentally unfriendly, virtually irreversible, and out of character with the open space and recreation objectives for the Property. Additionally, Town Staff indicated the solar field currently installed at the Jackson Road location is satisfying the Town's electrical requirements.

Although this committee as a whole looked favorably upon locating a second community garden at the Property, a representative of the Penfield Community Garden indicated a second site is not desired on this Property.

Land Development

Description of land uses

Commercial & mixed-use development

Residential development, retirement community

Cemetery

Reasons for not recommending for implementation

Per the committee's charge, the following provides a description of land usage and why we do **not** support usage of the following proposals. 6979 residents of Penfield voted on February 28, 2018 to either support or reject the Shadow Lake/Shadow Pines Community Advisory Committee findings (09-02-2016), which had been submitted to the Penfield Town Board. In an overwhelming show of support – 5671 yes, 1308 no, these same residents affirmed that they were in agreement with Shadow Lake/Shadow Pines Community Advisory Committee. The Committee recommendations to

best serve the Property, with a combination of active and passive recreational uses was as follows: Lodges/Pavilions, Playgrounds, Sports fields, Trails (foot and/or bicycle), and wild space.

Commercial and mixed use development

This usage is contrary to the public vote and the sentiment which was expressed in that vote. Commercial development would result in a loss of a significant portion of the open space and result in a drastic change to the look of the Property. This would not support the community's long-term interests. Also, the 2010 Comprehensive Plan identified the Property as recreation/sanctuary land.

Residential Development, retirement community

This usage is contrary to the public vote and the sentiment which was expressed in that vote. Residential development would result in a loss of a significant portion of the open space and result in a drastic change to the look of the Property. This would not support the community's long-term interests. Additionally, it was determined that residential development would put an increased load on the town's infrastructure, roads and the school system.

Cemetery

This usage is contrary to public comments.

Athletics

Description of land uses**Tennis Courts**

The committee does not recommend the installation of tennis courts. This would require the installation of fences, proper surfaces and netting. More tennis courts are not needed as they are found at various parks throughout Penfield.

Skate Park

The committee does not recommend a skate park as it would take away from the natural aesthetics of the Property and take away from the character of the land.



Figure 12 - Skate Park

Pump Track

The committee does not recommend a pump track for the Property. Pump tracks are not compatible with the desires of the public, and, if not properly maintained, can become hazardous.



Figure 13 - Pump Track

Ropes course, zip-line

The committee does not recommend a ropes course or large zip-line. There are no resources to staff an area where there would need to be proper supervision.

Golf Course 18 hole/9 hole executive

The committee does not recommend a golf course of any sort. There are multiple courses in and around Penfield and another course is not needed.

Soapbox Derby Facility

The committee heard a proposal for installing a soapbox derby facility on the Property. The committee recommends against this proposal as it would take too much space on the Property and utilized by too few residents.

Motor Sports

The committee does not recommend that motorized vehicles used by the general public be allowed on the Property.

Driving Range

The committee heard a proposal for a privately-operated driving range on part of the south side (former back 9). The committee decided this use would take too much space away from other activities, be too expensive to implement and maintain, and would require a lengthy open bidding process for interested operators. The committee recommends a driving range not be installed on the Property.

Passive Recreation

Description of land uses**Off-leash dog park**

While there was some community support for the development of an off-leash dog park, the implementation of this idea would require fencing off of a section of land and is not compatible with

the desire to keep the land open and natural. There is also an existing park within Penfield at Ellison Park. The committee does not recommend the development of an additional dog park.

Conservatory

There was limited support (1 vote) for a conservatory versus support for active recreation options. The committee does not recommend creating a conservatory at Shadow Pines Property.

Outdoor/Indoor exhibits (art)

There was limited community support for art exhibition space (2 votes). Certainly indoor art exhibit space is not conducive to the intended outdoor recreation spaces envisioned by the community and committee. The committee does not recommend the use of the land for art exhibits.

VII. Conclusion

It is a once in generation opportunity for a town to claim over 200 acres of space for community use and to allow residents to shape the future of that space. Open spaces like Shadow Pines are vitally important to the physical, mental, and emotional health of the community, providing an area that can be shaped and reshaped to meet the needs of the residents over time. The committee is grateful for being given the opportunity to be a part of that process. We would like to thank the Town Board and the many Town employees (seen and unseen) who took time out of their valuable work and personal schedules to guide us through the process and provide all the resources we requested to create this proposal.

This committee recommends that replanting programs be implemented, along the buffer zone and elsewhere on the Property, to replace the trees that have been removed due to illness or damage. The growth of trees is essential to green space and will help preserve the natural state of the Property.

The committee would also like to thank the many residents who came out in support of purchasing the Property and those who provided input on the use of the Property through online submissions, speaking at the public input session, and the countless conversations with committee members. All the suggestions received were considered (some painstakingly) by the committee and we tried to balance all the uses as best as we could. In the end not all suggestions were considered appropriate for the Property, but the overwhelming majority of them (outdoor active and passive recreation) we recommend here in some form; in some cases providing much-needed space to some underserved user groups.

Community open space is often on the decline around the country and we are thankful that Penfield is not one of those places. It is the committee's unanimous desire that Shadow Pines remain forever a recreational space for the Town of Penfield and surrounding residents.

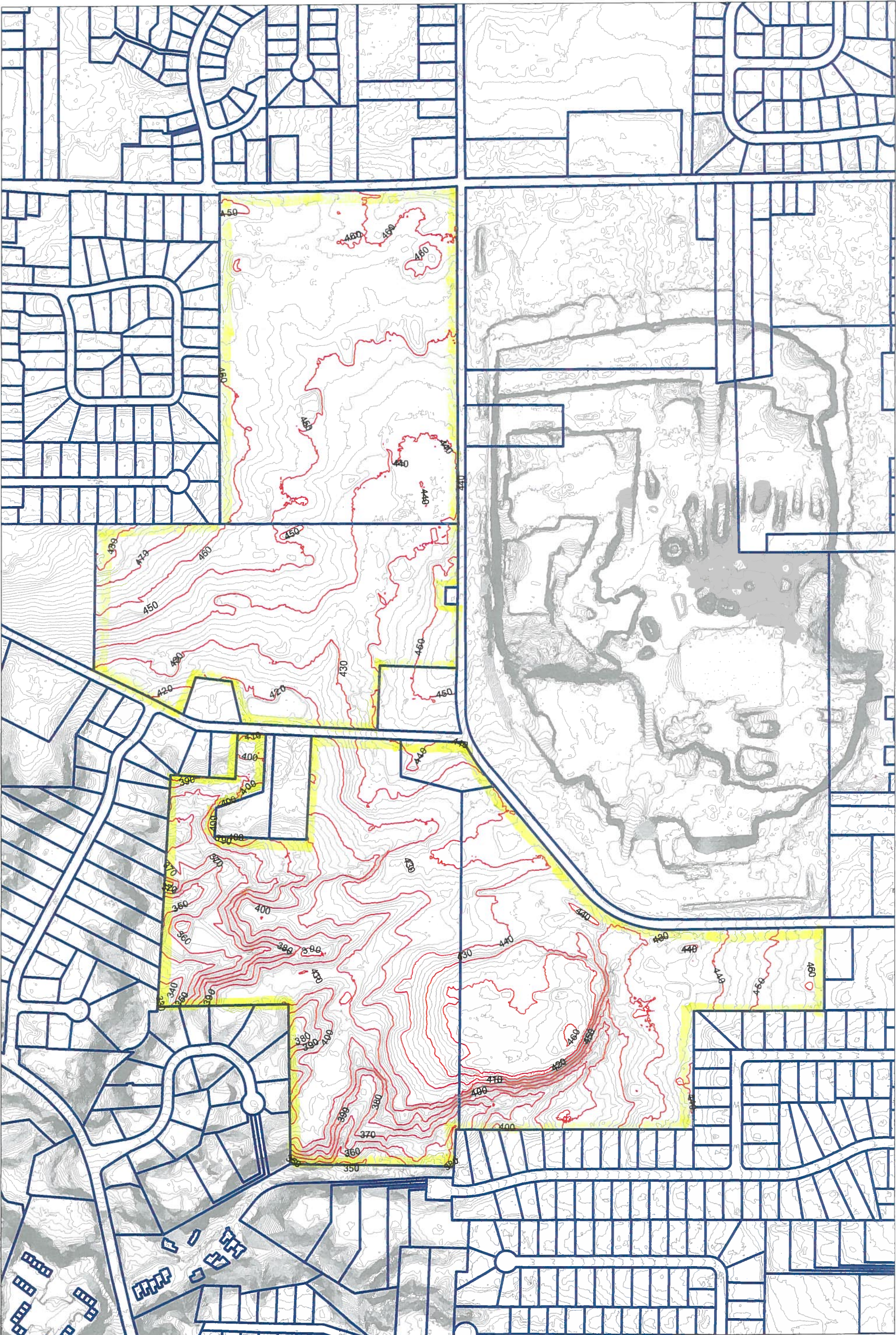
Some time was spent discussing the potential need for improved public facilities such as a new community center and public library. The committee found these questions to be beyond the scope of our charge and generally inconsistent with the open space objective for the Property. The Town Board may want to revisit these concerns at another time.

Parking facilities may become an issue in the future. Depending on the eventual use of the Clark House, the shared parking arrangement could become awkward or inadequate. Since the 200 ft.

buffer zone restricts new development to trails and driveways, new parking facilities would not be located close to the approach roads, and valuable recreation space would have to be committed. The committee realized that issues such as parking, configuration of trails, paths, lodges, and pavilions, etc. are essential ingredients needing thoughtful implementation. It is recommended the Town engage professional municipal/environmental planning services to guide the planning and implementation of the best uses for the Property.

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CONTOUR

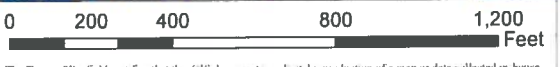
10 Foot Contours



July 2015 Parcels



2 Foot Contours



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