

RFP #18-001 | SUBMITTED FEBRUARY 8, 2018

# PROPOSAL: WAKE COUNTY HOSPITALITY TAX SMALL CAPITAL PROJECTS FUNDING

## TOWN OF APEX, PLEASANT PARK

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MR. DREW HAVENS, TOWN MANAGER  
PARKS, RECREATION & CULTURAL RESOURCES DEPARTMENT  
TOWN OF APEX  
73 HUNTER STREET  
APEX, NC 27502



*"The Peak of Good Living"<sup>SM</sup>*

Office of the Town Manager  
Drew Havens

## TOWN OF APEX NORTH CAROLINA

February 5, 2018

Ms. Denise Foreman, Assistant to the County Manager, Wake County Manager's Office  
301 S. McDowell St.  
Raleigh, NC 27601

RE: Town of Apex Pleasant Park Proposal for Wake County Hospitality Tax Small  
Capital Projects Funding

Ms. Foreman:

Please find enclosed our proposal for RFP #18-001, the Wake County Hospitality Tax Small Capital Projects Funding. The Town of Apex is pleased to provide the requested documents to support our request for \$1.5 million in grant funding to develop Pleasant Park, a 92.5-acre multi-use site that addresses recreation and wellness needs for residents of the entire community and provides the first park facility in south-central Apex.

Pleasant Park is an initiative designed to meet the needs of Apex citizens who currently face waiting lists for existing and planned programs due to our tremendous growth, while also providing a positive economic impact for both the Town of Apex and Wake County. The Town has committed \$3.5 million in land acquisition and \$300,000 in planning and design to the \$37.5 million project, and Apex residents passed the 2017 Parks Bond with overwhelming support (76% approval) to provide additional funding for Pleasant Park and other recreation facilities. Our request for \$1.5 million from the Wake County Hospitality Tax Small Capital Projects Funding is critically important to help the Town catalyze the first phase of the project, estimated at \$16.5 million, as bond funding is gradually developed.

The first phase of the project focuses on the multi-use fields, the splash pad, and site preparation for remaining areas - ensuring Wake County residents have access to programs close to home and bringing lacrosse, soccer, and youth football programs back to Wake County. We anticipate that the first phase completion will bring over

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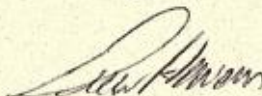
Ms. Denise Foreman  
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200,000 visitors annually to the Town, with an estimated economic impact of over \$4 million. This is projected to increase to well over 1 million visitors and \$10 million in annual economic impact at the completion of the project in phase three, further reducing the ROI estimate for the County.

When completed, the park complex will feature multi-use, lighted, synthetic turf fields for youth and adult programming in soccer, lacrosse, football, baseball, softball, and ultimate frisbee, with outdoor courts for volleyball, basketball, tennis, and pickleball, event space, gardens, environmental education, and play areas. The park also features the Town's first outdoor splash pad and a cross-country trail course, along with other innovative recreation elements. Multiple collaborations with area organizations have been established to ensure that everyone in our community and around the region will benefit from this project.

We are proud to showcase this incredible facility and to share the work of our town with you. Please don't hesitate to let us know if we can provide any additional information. Thank you for the opportunity to share this proposal with the Wake County Board of Commissioners.

Best Regards,



Drew Havens, Town Manager  
919-249-3301  
drew.havens@apexnc.org

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## 1.0 Executive Summary

**Project Overview:** Pleasant Park is the first public park project in south-central Apex, one of Wake County's fastest-growing areas, and addresses unmet needs for Apex citizens as well as the economic impact goals of the Town and Wake County. Pleasant Park is supported by Town funding as well as being one of four projects approved in the Town's 2017 Parks Bond, which allocates up to \$48 million in bond funding and was passed with a 76% approval rate. Town Council has mandated two primary objectives for Pleasant Park: first, to reduce existing waiting lists and provide additional capacity that enables Apex citizens to take part in existing and planned programming; and second, to create a venue that will have a positive economic impact on the Apex community. Pleasant Park was designed with several months of citizen engagement to meet those needs, and the 92.5-acre site will include both traditional and emerging amenities, including the Town's first water play amenity area, outdoor pickleball courts, and cross-country course. The park project has been designed to allow more residents to "stay and play" by providing additional facilities and amenities to host programming, tournaments, and special events without traveling outside the Town or County, as well as by increasing the number of out-of-town visitors and thus the anticipated economic impact.

**Funding Request:** The Town requests \$1,500,000.00 in Hospitality Tax Small Capital Projects Funding from Wake County to support Phase I of the Pleasant Park facility. The Town has already committed and spent \$3,800,000 to support land acquisition and preliminary design. The first phase, anticipated to cost \$16,550,918.41, includes all site preparation, water and sewer extensions, road access, multi-use fields, tennis and pickleball courts, splash park installation, and amenities and landscaping around finished areas. This phase is supported by the Town's Community Development Block Grant of \$330,000.00 towards amenities in an underserved area of Wake County and by Town funds, with additional fundraising and grant writing currently underway. (The full park development, in three phases, is expected to cost \$38.7 million and be complete by May 2022.)

**Design & Implementation:** The project has been designed and implemented with the leadership of the Town Council, the Parks, Recreation, and Cultural Resources Advisory Commission, and the Parks, Recreation & Cultural Resources Department as part of its 2013 Master Planning Process. The Town has contracted with WithersRavenel, a Cary-based civil and environmental engineering firm with a successful history of local government projects statewide, to facilitate public comment and outreach and design and engineer the site. WithersRavenel brings significant experience to the design process, having successfully designed recreation facilities in Holly Springs, Elkin, Greensboro, and many other towns and counties statewide. The Town's project team includes experienced parks & recreation professionals with over 80 years of combined experience in planning, designing, maintaining, and programming for state-of-the-art recreation amenities. The Department is led by Director John Brown, who formed the Department in 1986 and has shepherded the growth of the parks and recreation programs and facilities over the past 32 years. The Town of Apex has a long history of responsible fiscal management and successful completion of large capital projects and has been awarded a Certificate of Achievement for Excellence in Financial Reporting from GFOA for the past 23 years.

### Primary Engagement Contacts

Mayor Lance Olive | 919-249-3304 office | 919-656-9713 mobile | [lance.olive@apexnc.org](mailto:lance.olive@apexnc.org)

Mr. Andrew L. Havens, Town Manager | 919-249-3301 | [drew.havens@apexnc.org](mailto:drew.havens@apexnc.org)

The Town's fax number is 919-249-3407.





PLEASANT PARK



# ILLUSTRATIVE MASTER PLAN

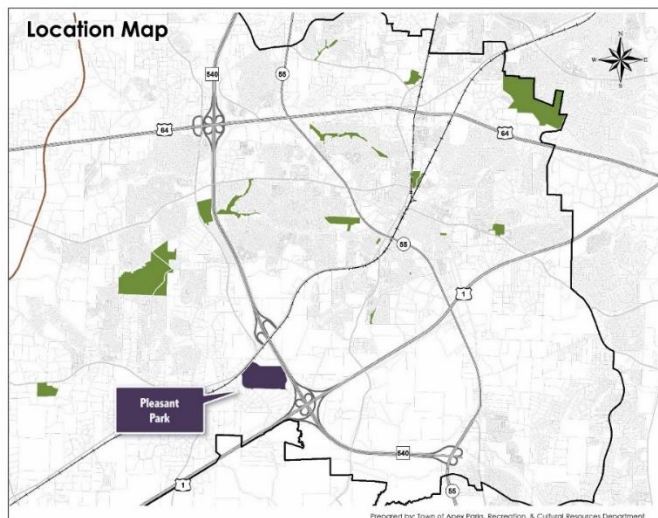
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FIGURE 1: THE ILLUSTRATIVE MASTER PLAN FOR PLEASANT PARK IN THE TOWN OF APEX.

## 2.0 Project Overview, Evaluation, and Visitor & Economic Estimates

The Pleasant Park project was the cornerstone of the Town of Apex's 2017 Parks Bond, which passed with a 76% approval rate. The Master Plan for the \$38.7 million project was approved in 2017 and includes the following elements on the 92.5-acre site:

- Six multi-use, lighted, synthetic turf fields for Youth and Adult Athletics including soccer, lacrosse, football, and ultimate frisbee;
- Three 325-ft. multi-use, lighted, synthetic turf fields for Youth and Adult Baseball and Softball;
- One 250-ft. multi-use, lighted, synthetic turf field for Youth Baseball and Softball;
- One-acre amenity area including splash pad/playground, sensory garden, shelters, environmental education, multi-age universal playground, and other amenities;
- Three lighted tennis courts;
- One 5K trail course for running, walking, and cross country;
- Outdoor courts for volleyball, basketball, and pickleball;
- Large lawn for gatherings and special events as well as passive open play opportunities;
- One maintenance facility; and
- Two fieldhouses with meeting rooms, office space, concessions, lockers and restrooms.



The Major Site Plan approval is scheduled for the Council's regular March 2018 meeting, with contracts for construction documents and contract administration to follow in April 2018. The park was developed in conjunction with the 2013 Master Plan, which involved over eight months of citizen feedback in the design of future facilities. The master planning process was specifically designed to encourage regional partnerships with surrounding municipalities for recreational connections, water quality, and open space preservation. The full plan is available at [www.apexnc.org/parksmaps](http://www.apexnc.org/parksmaps).

Pleasant Park **reduces existing capacity issues** that prevent both youth and adults from participating fully in the Town's athletic programs and **encourages economic impact** by attracting new events to the facility and allowing residents to "Stay and Play" for home events rather than traveling. The project includes the Town's first splash park, pickleball courts, public art installations, and cross-country course, and incorporates emerging recreation elements such as a sensory garden and multi-age playground.

**By generating an additional 200,000 recreational park visitors annually and creating at least \$4 million in economic impact from the first phase of park development, the park will remain a financially sustainable asset to the Town for many years to come.** Future growth after the park's three phases are complete is expected to reach 1 million visitors annually, with at least \$10 million in economic impact each year. The completion of this project brings future opportunities for collaboration between the Towns of Apex, Holly Springs, and Cary, as the three Towns will share facility capacity to host much larger tournaments and events on a national and regional scale.



## 2.1 Demand Analysis, Project Effectiveness, Visitor Estimates and Return on Investment

The first and most urgent need addressed by the new park facility are the numbers of Wake County and Town of Apex citizens waiting for participation in athletics programs.

<b>Waiting Lists</b>	<i>Adult Athletics</i>	<i>Youth Athletics</i>
<i>Spring 2017</i>	85%	60%
<i>Fall 2017</i>	56%	85%

**The Town anticipates that the addition of the four multi-purpose fields associated with Phase I (including the field capacity as well as lighted fields allowing longer hours of operation) will significantly reduce the number of citizens currently on these waiting lists.** In addition to individual waiting lists, numerous Apex community groups and nonprofits, including schools, are on waiting lists for longer-term rentals of field space, and would be able to access more long-term rentals when the facility is complete. This facility will ensure that all citizens are able to access high-quality recreational programming despite the rapid growth in south-central Apex and southwestern Wake County generally. In addition to addressing unmet needs for recreation programs, the complex also provides a community destination for wellness and outdoor activities, including the Town’s first splash park and a variety of unique facilities such as pickleball courts, a multi-age universal playground, a sensory garden, and environmental education. **Pleasant Park also addresses the Town of Apex Board of Commissioners’ goal of increasing economic impact related to recreation, tourism, and convention visitors.**

Phase I includes the multi-use fields and the splash park, which collectively are expected to bring in over 50,000 park users (roughly half from Apex and half from surrounding counties, with about 10% coming from out of state for tournament events). These fields will primarily be used by lacrosse, soccer, and youth football teams in the region, including Apex Sports Authority, NC Football Club Youth Programs, and Apex Red Devil Lacrosse. These agencies provided the following estimates for visitors, and splash park calculations are created utilizing visitor numbers from Fuquay Varina and Cary.

<b>Annual Visitor Estimates: Pleasant Park Phase I</b>	<i>Regular Season Residents</i>	<i>Regular Season Visitors</i>	<i>Special Events Residents</i>	<i>Special Events Visitors</i>	<i>Totals</i>
<i>Lacrosse</i>	4,000	3,500	2,600	2,000	12,100
<i>NCFC Youth Programs</i>	5,000	2,200	900	600	8,700
<i>ASA Youth Football</i>	5,000	1,750	1,500	1,500	9,750
<i>APRCR</i>	43,200	--	--	--	43,200
<i>Community/School Rentals</i>	5,000	--	--	--	5,000
<i>Total Athletics Program Visitors</i>	14,000	7,450	5,000	4,100	30,550
<i>Splash Park Visitors</i>	20,000	20,000	--	--	40,000
<i>Amenity Visitors – Peak Season</i>	15,000	8,000	12,000	8,000	43,000
<i>Amenity Visitors – Off Season</i>	8,000	4,000	--	--	12,000
<b><i>Total Park Visitors (Year 1, Phase 1)</i></b>	<b>119,200</b>	<b>46,900</b>	<b>22,000</b>	<b>16,200</b>	<b>204,300</b>

ASA, NCFC, and ARDL all noted in their support letters that they are using facilities outside of the Town boundaries to meet their needs for program registration, going as far away as Fayetteville to host programs for Wake County residents. Pleasant Park will allow many of those existing programs (in addition to the new programs noted above) to be relocated back to Wake County.



## Results from Visitor Estimates & County Return on Investment Worksheet

<b>Phase I Calculations: Pleasant Park</b>			
Estimated Wake County Residential Visitors (annual)	141,200	--	--
Estimated Day Visitors (annual total)	180,650	\$23 daily meal rate	\$4,154,950.00
Estimated Overnight Visitors (annual): 4,100 for two nights)	8,200	\$26 daily meal rate	\$213,200.00
Estimated Overnight Visitors (annual): 4,100 for two-day events (x 2 nights) = 8,200	4,852 (÷ 1.69 party size)	\$102 room rate	\$494,904.00
<b>Total Direct Spending</b>	--	--	<b>\$4,863,054.00</b>
Total Food & Beverage Tax Revenue (annually)	(1% Food & Beverage Tax)		\$43,681.50
Total Occupancy Tax Revenue (annually)	(6% Occupancy Tax)		\$29,694.24
<b>Total Taxes Collected Annually</b>			<b>\$73,375.74</b>
Grant Request Total			\$1,500,000.00
÷ \$73,375.54 (total annual tax revenue)			<b>ROI: 20.44 years</b>

*Please note that the expected ROI of 20 years will be significantly shortened when phases II and III of the project are completed in 2022. The projected visitor estimate increases to just over 1.1 million in that year, with overnight visitors expected at a rate of over 50,000 annually.*

In addition to Phase I visitors, the Town also anticipates an additional 33,000 event visitors per year when the Phase III baseball fields are completed (from twelve weekend events per year with a resulting direct spending of \$530,000 annually and an estimated economic impact of \$6.3 million per year) and an additional regular season visitor count of at least 20,000. By the completion date in 2022, the Town anticipates usage of over 1 million visitors per year at full capacity.

### ASSUMPTIONS & CALCULATIONS:

Calculations for these estimates are based on usage at other Town of Apex parks, revenues and visitor counts at neighboring municipal parks in Wake County, and estimates provided from Apex Sports Authority, Apex Red Devil Lacrosse, and NCFC.

For the Visitor Estimates and Return on Investment Worksheet provided in this RFP, we calculated residential visitors at 141,200 (the total of regular season and special event resident counts). We calculated estimated day visitors at 12,000 annually for the amenity areas; 20,000 for out-of-town visitors to the splash park; and 7,450 regular season visitors to athletic program games, for a total of 39,450 day visitors. This brings the total day visitors to 180,650. Total out-of-town athletics visitors were calculated at 4,100 for two-day events (two hotel nights bringing the total to 8,200).

For the splash pad, visitors will vary depending on the time of year, with Memorial Day-Labor Day considered the peak visiting months. The Town anticipates 3,000 local visitors per day at peak times, based on 16-minute cycles with four cycles per hour and eight hours per day of facility operation. Based on a 90-day period, an estimated 270,000 visits will occur, with about half residents and half non-residents based on other municipal usage records. However, this is reduced in Phase I as these estimates are based on the number of visitors intending to utilize all park facilities.

For the multi-use fields, usage will be primarily from APRCR programs, school programs, and weekly and long-term rentals to community groups. Rentals to schools and community groups are estimated at 5,000 visitors per year, but may be significantly higher by the end of the Phase III development. For youth soccer, APRCR holds two seasons per year with 450 participants each, which results in an estimate of 900 participants per year, with two adults per participant bringing the total youth soccer visitor estimate to 2,700 for 16 weeks (43,200). For the playground areas, visitors are expected to vary between peak season and off-season visits. The Town estimates 2,500 local visitors per day from April-October, and 1,500 visitors per day from November-March. This results in 525,000 peak-season visitors and 225,000 off-season visitors annually, which has been

reduced in Phase I as these estimates are based on the number of visitors intending to utilize all park facilities. These estimates are based on comparisons with other Wake County splash pad parks managed by municipalities.

For lacrosse, ARDL estimates an average of 7 home games per week for 12 weeks, with 300 total players (roughly half home and half visiting), 30 coaches, and 300 parents. This brings the total to 630 visitors per week for 12 weeks (7,560). ARDL estimates two special events per year (two-day tournaments featuring 32 teams in 5 games each). With 20 players per team, this is estimated to bring 700 players, 72 coaches, and 1500 parents and siblings (roughly half resident and half visitor), for 2,300 visitors per event. With two events per year, this brings the total to 4,600. For ASA youth programs, ASA estimates 9 weeks of home games (12 teams, 300 players, 450 guests) for a total of 6,750 visitors during the regular season. For the CFF playoffs, which Apex would now be eligible to compete to host, the weekend-long event would bring 10 games, 20 teams, 500 players, and at least 1,000 spectators for a total of 1,500 visitors. For the annual post-season Bowl Game, ASA brings 10 games, 20 teams, 500 players, and 1,000 spectators to the one-day event, for a total of 1,500 people. These special events bring in players from surrounding states as well as North Carolina. For NCFC youth football clubs, NCFC estimates five fields one day per week, 10 teams of 20 players, for a total of 200 players and 400 parents. These 600 visitors would occur weekly for a 12-week season, bringing the total estimate to 7,200. One special event per year is expected, bringing roughly 10 games, 20 teams, 500 players, and 1,000 spectators for a total of 1,500 visitors.

## 2.2 Collaboration & Partnerships

The Town has an established record of facilitating collaboration with community athletic and wellness groups and established sports leagues in its existing facilities. The park project was developed as part of the 2013 Master Plan, which involved over eight months of outreach and engagement with Apex citizens as well as strong collaboration with neighboring municipal and county agencies working to implement a larger regional vision for recreation in the Triangle.

This application includes letters of endorsement and support from Apex Sports Authority, North Carolina Football Club, Wake County Public Schools, Apex Downtown Business Association, and the Greater Raleigh Sports Alliance (see Section 8.1).

The Town anticipates that the facility will be utilized by various community and recreational leagues as well as established athletic programs. In addition, the facility will be available to teams from Wake County Public Schools as a closely-located facility for use in the growing region of southwestern Wake County. The Apex Chamber of Commerce has partnered with the Town in other programs and will assist in marketing the facility and its amenities for both Apex citizens and out-of-town visitors.

## 2.3 Evaluating Success

The Town remains committed to its transparency and responsible stewardship principles throughout all departments, and the PRCR Department remains committed to evaluating its programs and projects to ensure the best possible facilities and programs for Apex residents.

GOAL	EVALUATION METHOD	EVALUATION FREQUENCY
Increase capacity of youth and adult athletics by at least 25% in first three years and reduce existing waiting lists by an equivalent amount.	Waiting list reduction measurements	Seasonally
Increase wellness and recreational activities by Apex residents and non-Apex residents by welcoming at least 200,000 visitors to the splash pad and playground areas each year.	Ticket/fee sales, usage reports	Annually
Increase economic impact of athletic tournament events in Apex by at least \$4 million in each of the first three years, hosting between 6-10 multi-day or weekend tournaments each year.	Visitor & participant tracking; ROI formula from Wake County	Annually for three years
Evaluate financial sustainability and management and operations costs	Formal budgeting process	Annually
Evaluate staff, programming, and resident satisfaction in accordance with Town & Department policies	Surveys, staff retreats, Council feedback	Annually



### 2.4 Consistency with Room Occupancy & Prepared Food/Beverage Operating Principles

The Town of Apex fully supports the Wake County Room Occupancy and Prepared Food & Beverage Operating Principles established in 2017 and incorporates these principles into its plans for Pleasant Park. The park is a fully compliant, accountable, and viable solution to the important goals of:

- providing quality services and programs for citizens in a fair and equitable manner, particularly by meeting the significant unmet needs in Apex due to rapid growth & development;
- supporting investments that are current, relative, and market-competitive;
- developing facilities that are aligned with overall Wake County tourism and economic development goals; and
- engaging and leveraging community partnerships & collaboration to increase long-term impact.

### 3.0 Project Budget and Funding Sources

#### Phase I Project Budget

(See detailed cost estimates in 7.0.)

LINE ITEM	COST ESTIMATE
MOBILIZATION, CLEARING & EROSION CONTROL	\$901,200.00
GRADING	\$3,275,471.30
PAVING	\$2,806,113.06
SEWER DISTRIBUTION	\$364,828.00
STORM DRAINAGE	\$742,380.25
SITE AMENITIES	\$1,401,070.00
ATHLETIC FIELDS/COURTS	\$3,610,000.00
STRUCTURES	\$522,600.00
<b>SUB TOTAL</b>	<b>\$13,792,432.01</b>
CONTINGENCY	\$2,758,486.40
<b>TOTAL</b>	<b>\$16,550,918.51</b>

#### Full Project Budget (See detailed budgets in 3.1 and 3.2.)

ITEM	COST
Land Acquisition	\$3,500,000.00
Preliminary Project Design	\$297,000.00
<b>Project Development Subtotal</b>	<b>\$3,797,000.00</b>
Phase 1 Construction (MultiFlds & Splash)	\$16,550,918.51
Phase 2a Construction (Soccer Main Bld)	\$4,398,320.20
Phase 2b Construction (Baseball & Pickle)	\$1,626,728.68
Phase 3a Construction (Bsball Amenities)	\$12,979,724.44
Phase 3b Construction (Amenity Play/Shelter)	\$1,855,014.00
Phase 4 Construction (XCcountryTrails)	\$1,586,563.44
Project Construction Subtotal (incl. contingency)	\$38,708,749.38
<b>Total</b>	<b>\$42,505,749</b>

### 3.1 Project Development & Phase I Construction Funding Sources & Investment Ratios

PROJECT ELEMENT	FUNDING SOURCE	AMOUNT	YEAR	STATUS
Project Development	Town of Apex PRCR: Land Acquisition	\$3,500,000	2017	Confirmed & procured
Project Development	Town of Apex PRCR: Master Planning/ Design	\$297,000	2017	Confirmed & procured
<b>Project Development Subtotal</b>	<b>[100% Public]</b>	<b>\$3,797,000</b>		
Phase I Construction	CDBG (Community Development Block Grant) Amenity Area Funding	\$330,000	2017	Confirmed via Town of Apex Planning Dept. Confirmed pending sales tax data
Phase I Construction	Town of Apex Parks Bond (2017-2018)	\$13,248,827	2017	
Phase I Construction	Wake County Hospitality Tax Grant Program	\$1,500,000	2018	Application pending
Phase I Construction	Private sponsorships, naming rights, foundation grants	\$1,472,091		
<b>Phase I Construction Subtotal</b>	<b>[90% Public, 10% Private]</b>	<b>\$16,550,918</b>		
	<b>Total</b>	<b>\$20,347,918</b>		

**Investment Ratios:** While we anticipate that most of the Town’s funding responsibilities will come from public sources, including the sales tax bond, grant awards, and existing Town commitments, the Town does plan to actively pursue private assistance and naming rights and private sponsorships. The ratio of public to private investment is estimated at about 90% public funds and 10% private funds.

### 3.2 Impact on Existing Infrastructure

**Water and Sewer:** The project extends water service from existing mains along Kelly Road and Old US-1 to the park and enables future extensions into residential areas currently served by wells. Future connections will be managed by the Town in accordance with voluntary annexation policies for redevelopment or well failures. The Town currently has large water and sewer treatment capacity reserves and the project will not materially reduce these reserves. Sewer is provided via individual building packaged pump systems that will discharge into existing and planned infrastructure along Kelly Road. The project budget includes just over \$900,000 to address water and sewer improvements. The property also includes over \$1.4 million for storm drainage, including a constructed wetland (SCM), to minimize impacts on the surrounding property and on existing infrastructure.

**Greenways, Roads, and Schools:** The full project is proposed to include over three miles of walking trails, multi-purpose paths, and sidewalks. The project also includes significant on-site and off-site improvements to mitigate any traffic congestion created by the park project, which is expected to be minimal since park activity does not coincide with peak traffic times for other needs such as work, school, or commercial environments. While the project is solely recreational and does not include residential development, therefore not adding any students to the system, it is expected that agreements between Wake County Public Schools and the Town of Apex will be negotiated for use of the long-term recreational facilities that can supplement school facility offerings.



## 4.0 Project Timeline

PROJECT ACTION	START DATE	END DATE
STUDY AND ANALYSIS OF PROJECT	2016	2017
SITE IDENTIFICATION	2016	2017
PRELIMINARY COST ESTIMATES	2016	May 2016
PARKS BOND APPROVAL	June 2016	November 2017
MASTER PLAN APPROVAL	2017	November 2017
LAND ACQUISITION	2017	2017
BEGIN GRANT & FUNDRAISING EFFORTS	Dec. 2017	May 2022
REVISED COST ESTIMATES	2016	January 2018
CONTRACTS FOR CONSTRUCTION & ADMINISTRATION	April 2018	December 2022
ARCHITECTURAL & ENGINEERING STUDIES	2016	2018
MAJOR SITE PLAN APPROVAL	2017	March 2018
PERMITS OBTAINED	2018	May 2018
PHASE I: INFRASTRUCTURE, GRADING, PAVING	2018	February 2020
PHASE II FACILITY & AMENITIES	February 2020	July 2021
PHASE III FACILITY, STRUCTURES, MISC.	July 2021	December 2022

## 5.0 Project Operating Plan

The Pleasant Park project was developed as part of the Town's Master Planning process, which involved over eight months of meetings, surveys, and interviews to allow as much citizen involvement as possible. The park plan reflects the Town's commitment to excellence in recreational programming and amenities and follows the Town's existing marketing, operations, management, and finance best practices. The Town's Comprehensive Annual Financial Report (CAFR) is available at [www.apexnc.org/finance](http://www.apexnc.org/finance) and demonstrates the Town's success with moderate long-term debt and growth strategies for large projects. The Town of Apex has been awarded a Certificate of Achievement for Excellence in Financial Reporting for 23 consecutive years from the Government Finance Officers Association of the United States and Canada (CFOA).

The operating cost of the facility was included within the Department's overall operating budget for facility construction, maintenance, and operations. The facility's initial funding is significantly supported by the 2017 Parks Bond and grant support, and as such the Department expects the primary expenses to be operations and programming staff and equipment. This will be mostly offset by registration fees and programming costs along with tournament and special event revenue by the third year of operation. The full Town budget can be found at [www.apexnc.org/budget](http://www.apexnc.org/budget).

The Town is projecting a 6.6% increase in General Fund revenues over the prior fiscal year due primarily to the expanding tax base from new development and annexations, increased sales tax distributions, and development related fees. As a result, the PRCR budget for 2017 was \$4,368,311 (reflecting some additional costs associated with Pleasant Park development), and the projected budget for 2018 is \$3,874,373.

### 5.1 Operations, Maintenance, and Marketing

The Pleasant Park facility will be managed within the Town budget for Parks, Recreation, and Cultural Resources, as are all greenway and park facilities. The PRCR Department has exceeded projected

revenues and underspent projected expenses in each of the past ten years. The revenue for PRCR programs has increased in each of the past four years, from \$616,773 in 2013 to \$905,240 in 2016.

The Town will continue to provide maintenance and programming services for this facility, just as it has always done for its other amenities. The marketing for the facility will follow Department guidelines for existing facilities as well as outreach and marketing principles utilized by the Department for existing tournaments and special events. The project is expected to become fully self-sustaining through program fees, tournament fees, and a minor outlay of Departmental funds as is consistent with other Town recreational amenities.

## **6.0 Organizational Information**

### **6.1 Organization History & Background**

The Town of Apex, incorporated in 1873, is governed by a five-member Town Council and Mayor. Council Members include Bill Jensen, Wesley Moyer, Audra Killingsworth, and Brett Gantt. The Mayor is Lance Olive and the Mayor Pro Tem is Nicole Dozier. Nonpartisan elections are held in odd years and conducted by the Wake County Board of Elections. Municipal operations are overseen by Drew Havens, Town Manager, and Shawn Purvis and David Hughes, Assistant Town Manager(s).

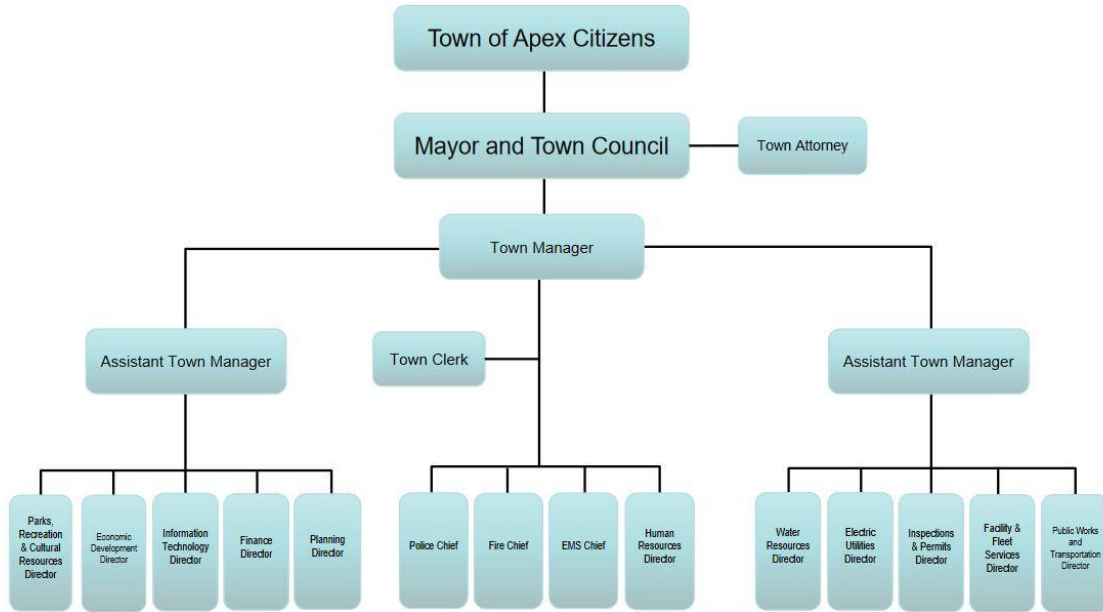
The Town of Apex, located in the southwestern corner of Wake County, has seen tremendous population growth since its first ranking on the Money Magazine Best Places to Live in 2007 (at number 14). It was named the #1 Best Place to Live in 2015.

The Parks, Recreation, and Cultural Resources Department, led by Director John Brown, has shepherded the successful development of several parks and facilities. In 2017, working with Apex residents' groups, area nonprofits, and other Town staff, the department prepared a Parks Bond that was passed with a 76% approval rate in November. The bond, which institutes a property tax increase to provide up to \$48 million in parks and recreation amenities funding, is to be utilized for four specific projects identified by Apex residents: Beaver Creek Greenway, Middle Creek Greenway, Community Center Expansion/Senior Center, and Pleasant Park.

The Parks Bond initiative was one of several commitments made by the Town Council over the past several years to increase the number and variety of parks and recreation amenities, and the park project has been approved by the Board in the Apex Parks, Recreation, Greenways and Open Space Master Plan.



# Town of Apex Organizational Chart



September 2016

## 6.2 Organization Financial & Legal Information

Please see Attachment 8.3 for certification that there are no conflicts of interest or pending litigation that would impact this project.

See Attachment 8.2 for a copy of the Town of Apex 2016 IRS Form 990 and a copy of the 2016-2017 audit and management letter. The Town’s Comprehensive Annual Financial Report (CAFR) is available at [www.apexnc.org/finance](http://www.apexnc.org/finance). The Town of Apex has been awarded a Certificate of Achievement for Excellence in Financial Reporting for 23 consecutive years from the Government Finance Officers Association of the United States and Canada (CFOA).

## 6.3 Proposal Team Experience & Similar Projects

The Town of Apex, along with its contracted firms, has several years of experience conducting successful similar projects in the fields of parks, recreation, and cultural resources.

### **John M. Brown, Director: Town of Apex Parks, Recreation and Cultural Resources (1986- Present)**

*Bachelor of Science- Recreation Leadership (Minor in Business Administration), Western Carolina University, Cullowhee, North Carolina; Master of Science-Recreation Administration, University of North Carolina-Chapel Hill*  
 Mr. Brown started the Apex Parks, Recreation and Cultural Resources Department in 1986 after obtaining his Master's Degree in Recreation Administration. Prior to that, he served for 3 years at the Assistant Director of the Clinton Family YMCA in Clinton South Carolina. During his tenure, the department has grown from a staff of 1 with a budget of less than \$100,000 to a department with 28 full-time staff and an annual budget of over \$3.5 million.

During his professional career, Mr. Brown has served in multiple leadership roles at the local, regional and state levels of the North Carolina Recreation and Parks Association, receiving multiple professional awards and recognitions. He has completed the Municipal and County Administration Course through the UNC Institute of Government, the first 2 years of the Parks Maintenance Management School at North Carolina State University as well other Parks and Recreation related leadership courses and seminars. During his tenure in Apex, the Town has passed 3 successful parks bonds totaling over \$60,000,000 with an average approval of over 80%, received multiple County, State, and Federal Grants for park acquisition and development. The Town has acquired over 500 acres of parkland, developed over 10 miles of public greenway, and currently, owns, operates, or manages over 20 sites for public recreation. Similar to Pleasant Park, these projects include the Apex Community Park, the Apex Nature Park / Seymour Athletic Fields, Apex Jaycee Park, and Kelly Road Park. The Town has also completed multiple public / private projects including the Halle Cultural Arts Center, and the Rogers Family Skate Plaza, adopted 3 Comprehensive Parks, Recreation, Greenways, and Open Space Master Plans, and recently adopted the Town's first Public Art Plan. In addition to this work with the Town, Mr. Brown has been an active member in the community serving as past President of the Apex Rotary Club, being named the 2003 Apex Chamber of Commerce Citizen of the Year, and was inducted to the Lewis C. Smith Hall of Fame in 2015 which recognizes citizens for their lifelong and forever lasting contributions to the Apex community.

**Karl Lyon, Recreation Program Manager: Town of Apex Parks, Recreation and Cultural Resources**

*Bachelor of Science in Parks and Recreation from Mars Hill University*

Mr. Lyon has 28 years of experience in municipal government and public parks and recreation. His experience is concentrated in the development, planning and execution of a wide variety of programs and the staff that is charged with leading that effort. He also has experience in the design and building of three different greenway connections and multiple single-track trails equaling an estimate of 7 miles in Sanford NC. In addition, he has overseen the building or renovation of tennis courts at Apex Nature Park, Apex Elementary, Kelly Road and most recently, Apex Community Park. Mr. Lyon has been a contributor of development ideas for not only Pleasant Park but also Hunter Street Park and the Apex Senior Citizen wing that will start construction in late 2018.

**Craig Setzer, Parks Maintenance Manager: Town of Apex Parks, Recreation and Cultural Resources**

*Bachelor of Recreation Management/Concentration in Parks and Recreation from Appalachian State University*

Mr. Setzer has over 15 years of experience in municipal parks & recreation, including the past seven years as Parks Operations Manager. His duties include maintenance management of approximately 406 acres of parks, 4 school parks and an estimated 10 miles of greenways. He has experience assisting with the design of several parks and their facilities including the Apex Nature Park, Salem Pond Park, Hunter Street Park and Seagroves Farm Park. He also has played an integral role in the artificial turf renovation of the soccer fields at Hunter St. and the Apex Nature Park. Prior to becoming the Parks Operations Manager Mr. Setzer's primary duties were in athletic programming. Mr. Setzer was responsible for running numerous youth and adult athletic leagues and tournaments. He has been involved in administering traditional sports, such as soccer, baseball, basketball and softball, as well as nontraditional sports, such as dodgeball. While programming he successfully increased participation numbers in each of the leagues and events he was involved with. He was also heavily involved in the rentals/reservations of all athletic fields/facilities. Mr. Setzer also has experience managing a recreational facility. Mr. Setzer managed a recreation facility including racquetball courts, a gymnasium, classrooms, playground and a pool. His responsibilities included programming, scheduling maintenance, administering the budget and supervision of employees. Mr. Setzer is currently a certified playground inspector. He has also received honors for completion of Maintenance Management School through the National Recreation and Park Association. He is currently a member of the North Carolina Parks Association.

**Angela Reincke, Parks and Greenways Planner: Town of Apex Parks, Recreation & Cultural Resources**

*Bachelor of Science in Landscape Architecture from Purdue University*

Ms. Reincke has 25 years of experience in Public Planning with an emphasis in Parks and Greenways. With the Gold Medal-awarded Arlington Heights Park District, IL, she led the design and development of the 50+ acre Lake Arlington (2.5 miles of greenway, playgrounds, and educational/boating camp facility), the 56-acre, 9 hole, par 3, Nickol Knoll Golf Course on a Village leased landfill and development of Melas Sports Complex, leased from the Metropolitan Sanitary District through the Village of Mount Prospect. With James Martin and Associates she was awarded the Daniel Flaherty Award for Park Excellence for the North School Park project. In addition to planning experience with Palm Beach County and the Town of Cary, Ms. Reincke has also provided insight for Wake County Greenway Systems Plan in which over 70% of survey responses were provided from Apex residents. She also was on Wake County's Master Plan project consultant selection team. In addition to the Pleasant Park project, the Town of Apex's Park, Recreation and Cultural Resources Department is currently in the design and development of 3 major greenway corridors (White Oak Creek, Beaver Creek and Middle Creek). There are also 19 developer constructed greenway segments and several other smaller Town managed greenway connector projects in the works. The Town was recently awarded an LWCF grant for the Salem Pond Park project which includes a universal playground with environmental and historical education components. Ms. Reincke has been an active contributor of the Apex Community and the Triangle region as a 15-year member and Chair of the Apex Parks, Recreation and Cultural Resources Advisory Commission, past President of Citizen's for Apex Parks securing funding for the construction of Kidstowne Playground (\$150,000), renovation of the Halle Cultural Arts Center (\$1M) and the development of the Rodgers Family Skate Plaza at Trackside (\$300,000). Other notable positions include TBJ's 40 under 40 (2007), Triangle Reality Check, Member of the Western Area Plan Advisory Commission, and Advisor on the Durham Submittal Process Review.

**Patrick Fitzsimons, Program Supervisor: Town of Apex Parks, Recreation & Cultural Resources**

*Bachelor of Arts in Economics from Amherst College*

*Master of Arts in Parks, Recreation & Tourism Management from NC State University*

Mr. Fitzsimons has over 9 years of experience in municipal parks & recreation. His primary duties have been in athletic programming, running a wide variety of youth and adult athletic leagues and tournaments. He has been involved in coordinating traditional sports, such as soccer, baseball and softball, as well as alternative sports, such as lacrosse, ultimate Frisbee, and flag football. He has successfully increased participation numbers and expanded age groups in each of the leagues and events he has been involved with. He has also created new programs to meet changing trends and increasing demand from a growing population. Mr. Fitzsimons also has experience managing large athletic complexes, as well as maintaining facility schedules for fields and gyms throughout the Town. He has served as tournament director for a variety of large-scale tournaments and coordinated many different special events. Mr. Fitzsimons has also been involved in advancing the profession through his work with the North Carolina Recreation & Park Association (NCRPA). He has served as chair of various committees, where he has led educational sessions and helped fundraise for the Association.

**Matt Steele, Recreation Program Specialist: Town of Apex Parks, Recreation and Cultural Resources**

*Bachelor of Science in Parks & Recreation Management from East Carolina University*

Mr. Steele has 3 years' experience in the Parks & Recreation field with the majority of his time being spent programming youth athletic events. He has coordinated and contracted out numerous baseball and basketball tournaments over the years and seen a steady growth in participation numbers of programs he has developed. Mr. Steele also has experience in maintaining large parks and developing programs to fit the parks availability. In the past, he has worked with companies such as Top Gun and Triple Crown to coordinate travel baseball tournaments at his facilities that consistently bring thousands of participants to the area. During his time in Nash County, Mr. Steele spent time on the Park Committee, helping develop ideas for the Nash County Miracle Park

which is currently under construction. This park will be available to the public by late 2018 and will be home to 2 full sized soccer fields, 4 regulation baseball fields and a splash pad.

**WithersRavenel** is under contract to the Town of Apex for design and engineering services for Pleasant Park. WithersRavenel is a full-service civil and environmental engineering firm, based locally in Cary, with a long history of successful projects in the Triangle region and statewide, particularly with local and state government partners.

## 7.0 Attachments

- 7.1 Pleasant Park Renderings and Drawings
- 7.2 Letters of Endorsement and Support
- 7.3 Audit Management Letter and IRS Information
- 7.4 Statement on Conflicts of Interest & Litigation
- 7.5 Phased Cost Estimates: WithersRavenel, Inc.