



Settler's Hill Cross-Country Course Market and Feasibility Study

Submitted to:

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June 11, 2015



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Dear Mr. Anderson,

Kane County engaged Hunden Strategic Partners (HSP) to conduct a market and financial analysis and economic impact study regarding the potential development of a cross-country course and trail system on the now closed Settler's Hill landfill. The analysis included the local, regional and national cross-country usage and events, the local market supply and demand for courses and event types, and existing conditions on site. The attached is our report.

This deliverable has been prepared under the following general assumptions and limiting conditions:

- The findings presented herein reflect analysis of primary and secondary sources of information that are assumed to be correct. HSP utilized sources deemed to be reliable, but cannot guarantee their accuracy.
- No responsibility is taken for changes in market conditions after the date of this report and no obligation is assumed to revise this report to reflect events or conditions occurring after the date of this report.
- HSP has no control over construction costs or timing of construction and opening.
- Macroeconomic events affecting travel and the economy cannot be predicted and may impact the development and performance of the project.

We have enjoyed serving you on this engagement and look forward to providing you with continuing service.

Sincerely yours,

Hunden Strategic Partners

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INTRODUCTION

Kane County, in collaboration with the Kane County Forest Preserve District, engaged Hunden Strategic Partners to study the market forces upon, and the financial projections of, a new cross-country course on the now closed Settler's Hill landfill. HSP was also requested to recommend the best strategies to maximize usage and minimize the potential for financial losses. This research included the local, regional and national cross-country usage and events, the local market supply and demand for courses and event types, and existing conditions on site. The new facility will be located directly west of the Fifth Third Bank Ballpark and adjacent to the existing Settler's Hill Golf Course. The effort and course should put it in a position to attract local users as well as visitors regional and potentially national to Kane County for events.

Hunden Strategic Partners identified and studied examples of cross-country facilities that could be considered regional competitors, and facilities that would likely not be competitive but are similar or exemplary from around the nation.

The findings include the conclusion that there is demand for dedicated cross-country course and not many ideal sites in the region of more than 20 million people. However, given the economics and supply/demand issues surrounding cross-country, it is not likely that this use, by itself, will be financially sustainable without participation from entities outside of the specific cross-country operations. However, there will be economic, fiscal and other impacts from those coming to Kane County to utilize the course and use hotels, restaurants and shops in the area.

Today, cross-country is run in parks, golf courses, farmlands, and other topographic settings. There has been a recent effort to construct courses that are designed with the sole purpose of cross-country racing. Also, many unique and great courses have been incorporated into multi-use spaces, such as historic parks or farmland, designed or reconstructed with cross-country in mind. Unfortunately, there has also been a trend that has led the sport of cross-country to suffer. This is the adaptation of cross country racing onto extremely transformed and confined terrain nearly entirely reconstructed by man, specifically golf courses.

Courses such as LaVern Gibson in Terre Haute, Indiana and Rim Rock Farm in Kansas have been designed specifically for cross-country racing. All provide a matchless cross-country experience and are excellent examples of cross-country courses by design. Each of these provides a unique experience and are not built onto excessively refined, man-altered terrain.

Another important part of cross-country is the human element: coaches and spectators. Given the opportunity to design land for the sport of cross-country, each group can be considered and designed for. Spectators should be afforded spaces to view lengthy and interesting segments of the race along and be provided the conveniences of quality facilities and parking. Bleachers, video boards, and updated timing scores can be provided for the spectators if the land is used solely for cross-country. Permanent features and improvements can be developed without creating conflicts with other uses if the site can be designed solely for the sport of cross-country. Also advantageous to land dedicated to cross-country is the ability to design and maintain the terrain and surfacing specific to the sport.

Overall, designing for the athlete, which provides safety, well defined routing and proper carrying capacity, an accomplished sense of place, advanced technologies and facilities, sport appropriate and safe footing and reasonable terrain, and spectator engagement would considerably improve the attractiveness of Settler's Hill. Courses that are able to accommodate many different distances, various levels of athletic prowess, and remain unique are remembered and will be utilized.

Kane County's leaders realize that a community amenity such as the Settler's Hill Cross-Country Course is valuable to the county at many levels, and is rarely profitable when serving the community at rates affordable to a majority of users. As such, a small portion of the operating costs may be subsidized by local tax base to help fund the cost of operation.

So long as the stakeholders establish a clear strategy and realistic vision for the Settler's Hill course, whether it is a recreational site or an event driven site, the repurposing of Settler's Hill will be an opportunity missed if the County foregoes the chance to meet this demand. The chance to develop a facility like the proposed Settler's Hill Cross-Country Course is an opportunity not many counties are privileged to consider. The prospect of meeting and growing this community's athletic demand while at the same time helping to induce economic activity to the county is an exciting step for Kane County's place in the larger regional consciousness.

Project Profile

Kane County, (County) has proposed a strategic plan to redevelop the Settler's Hill Landfill that was closed in 2006. The proposed Project has stakeholders, all of whom will approve the final design of the Project. The site is owned by the County and operated by Waste Management of Illinois, Inc. The master plan for the 700-acre complex, which includes both the Settler's Hill and Midway Landfills, was developed by Kane County in conjunction with the Kane County Forest Preserve District. The stakeholders prefer to see the site divided into 90 percent passive and 10 percent active uses.

Waste Management of Illinois, as the operator is responsible for the operations, maintenance and environmental management of the closed landfill. The approval of Waste Management of Illinois is required for every major phase of the cross-country facility design and permitting. The Kane County Forest Preserve District is partnering with Kane County on the Master Plan and will approve the final design of the trail system.

Until 2006 the site was the location of the Settler's Hill and Midway Landfills. However, even with the closure of the landfill, Waste Management is still the primary operator of the site and is legally liable during its post-closure care period, which runs through 2037, at a minimum. for the site until 2037.

While the plans for the project are not finalized, the current master plan proposes the following:

- Modify the first hole of the Settler's Hill Golf Course to be a driving range.
- Convert Hole 17 of the golf course into two holes.

- Reconfigure the course to obtain returning nine holes on the golf course.
- Possible incorporation of par three instructor holes.
- Development of arena: Rivers Edge outdoor event facility.

The following figure shows the most current Settler's Hill Master Plan. The proposed configuration of the cross-country course is highlighted in green.

Figure 1



The following figure is a closer perspective of the cross-country course.

Figure 2



The most recent design consideration for the cross-country course is the result of the Weaver Boos Consultants' (WBC) design report that was submitted to Kane County in October 2014. The plans were drafted with the goal of developing a championship level cross-country course that would serve as the premier location for Illinois high school and collegiate cross-country events. County residents could also use the course when not programmed for scholastic or other competitive events. The location of the site presents several design challenges, primarily that excavation into the landfill cannot occur in order to preserve the integrity of the landfill cap. Therefore, any alterations to the topography of the site must be completed by adding soil material onto the landfill cap.

With input from the USA Track and Field and the Client, it was determined that the course optimally would be designed to have the ability to host 2k, 3k, 4k, 3-mile, 5k, 6k, 8k and 10k

races. WBC used the 2013/2014 NCAA Men's and Women's Track and Field and Cross-Country Rules as the guideline. The major requirements for a regulation cross-country course are listed below.

- All runners are equidistant from the start line to the first turn.
- The first turn cannot be less than 600 meters from the start line. However, the NCAA Rules Committee is expected to reduce this to 400 meters, as it is not easily feasible at most existing locations.
- The course width shall not be less than ten meters wide and, if possible, a one-meter wide obstacle-free zone on the outside and inside of the course.
- The last 200 meters of the course must be straight, flat and at least ten meters wide.

The potential incline of the course is another significant design feature that must be considered very closely. The site currently has several areas that are very steep and must be altered to make it possible for a cross-country course to be developed. The design proposes no incline greater than eight percent and any inclines at these levels are to be restricted to the shortest distances possible. Moreover, WBC implemented runner recovery areas, or areas of very little incline, after stretches of the course that would have steep inclines.

The start wedge for the course is proposed to be located in the center of the hill. This was the only configuration that allowed for all categories of races and was feasible given the physical constraints of the site. The design proposes the construction of a parking lot at the northeast corner of the site, which would be accessible via the Fifth Third Bank Stadium north access road. However, the primary event parking is to be in the Kane County Cougar and Forest Preserve District parking lots. Pedestrian trails will lead from the parking lots to the start, prep and viewing areas of the course. Additionally, a shuttle or tram is under consideration to allow for easier travel from the course to the parking lots. Access to the main viewing area will also be possible from Fabyan Parkway to the south, which will use an existing landfill haul road. Lastly, additional pedestrian trails are proposed in and around the site to allow for access to various viewing areas.

The provision of adequate and appropriate sightlines for both seated and standing spectators at Settler's Hill is an important part of achieving safe conditions as well as a quality experience. The Settler's Hill Cross-Country Course is designed to provide quality sightlines throughout the venue that will alleviate excessive crowd movement and pressure on ingress and egress areas. The sizeable site will reduce spectator density along the course, while accommodating greater capacities than existing facilities like forest preserves.

A major part of the Settler's Hill experience is watching the cross-country event. The overall experience of the event is affected by the sightlines that will be enhanced by the design and configuration of the course and the overall open hill. The superior views of the events on Settler's Hill will enhance the attractiveness and potential revenue generating opportunities of such events.

The capital sourcing for the proposed project is expected to come from the County and/or the Forest Preserve District. However, specific funding sources have yet to be determined. Initial costs for the construction of the Settler's Hill Cross-Country Course have been estimated at \$3.88

million. The budget estimate includes funds for alterations to the methane gas collection system, course construction, and “dirt loss” that could be associated with the landfill settling during and after completion of construction. Some of the landfill’s methane gas collection infrastructure may have to be altered or moved as a result of the current plan. This was determined after working with Waste Management of Illinois, which must approve any changes to the gas collection system before any plans can be finalized. The project budget includes two percent erosion control and a ten percent contingency based on the likely settlement of the landfill. Proposed final design plans have not yet been developed for Waste Management's review.

SUMMARY OF CONCLUSIONS FROM CHAPTERS

Local Demographics and Economy

Kane County has demonstrated a growing and energetic economic climate over the past decade. With consistent growth, the region tends to weather economic recessions without a significant amount of contraction the way other cities with one main industry can. This is due to the large variety of economic resources and businesses, government work, health care centers, bank, credit card processing centers, and many school systems and colleges that employ teachers and staff. As a part of the rapidly growing western Chicagoland suburbs, the area has historic and well-maintained city neighborhoods that offer quaint older neighborhoods, and new suburban communities in the former prairie fields both east and west of the Fox Valley. Continued growth is likely, due to the variety of employment opportunities, combined with good schools, community and four-year colleges, sports, recreation and cultural offerings.

Overall, the trends in the market are favorable for a cross-country course development, based on the fast-growing regional economy, population and the specific improvements in the immediate sports-themed area around Settler’s Hill. It provides an additional recreational asset for the County that enhances quality of life.

Sports Market Analysis

Various cross-country courses exist throughout Kane County and the state of Illinois. The majority of these cross-country sites exist in parks, forest preserves, school campuses and golf courses throughout the state.

The following table shows the Illinois High School Association conferences with schools locate in Kane County. The schools highlighted are located in Kane County.

Table 1

| IHSA Conferences Near Settler's Hill | | | | | |
|--------------------------------------|---------------------------|-------------------------------------|-----------------------------------|-----------------------|------------------------------|
| Northern Illinois Big Twelve | Fox Valley | Metro Suburban | Northeastern Athletic | Suburban Christian | Upstate Eight |
| DeKalb H.S. | Cary-Grove H.S. | Aurora Central Catholic H.S. | Alden Hebron H.S. | Aurora Christian H.S. | Bartlett H.S. |
| Kaneland H.S. | Crystal Lake Central H.S. | Chicago Christian H.S. | Christian Liberty Academy | Marmion Academy | Batavia H.S. |
| Morris Community H.S. | Crystal Lake South H.S. | Elmwood Park H.S. | Christian Life H.S. | Montini Catholic H.S. | East Aurora H.S. |
| Sycamore H.S. | Dundee-Crown H.S. | Fenton H.S. | Faith Lutheran H.S. | Rosary | Elgin H.S. |
| Yorkville H.S. | Grayslake Central H.S. | Glenbard South H.S. | Harvest Christian Academy | St. Francis | Geneva H.S. |
| Rochelle Township H.S. | Grayslake North H.S. | Guerin Preparatory H.S. | Hiawatha H.S. | | Glenbard East H.S. |
| Geneseo H.S. | Hampshire H.S. | Illiana Christian H.S. | Illinois Math and Science Academy | | Larkin H.S. |
| LaSalle-Peru H.S. | Huntley H.S. | Immaculate Conception Catholic Prep | Keith Country Day School | | Metea Valley H.S. |
| Ottawa Township H.S. | Jacobs H.S. | Ridgewood H.S. | Luther H.S. North | | Neuqua Valley H.S. |
| Sterling H.S. | McHenry East H.S. | Riverside Brookfield H.S. | Mooseheart School | | South Elgin H.S. |
| | Prairie Ridge | St. Edward Central Catholic H.S. | Westminster Christian School | | St. Charles East |
| | Woodstock H.S. | Timothy Christian School | | | St. Charles North H.S. |
| | Woodstock North H.S. | Walther Christian Academy | | | Streamwood H.S. |
| | | Wheaton Academy | | | Waubonsie Valley High School |
| | | | | | West Aurora H.S. |
| | | | | | West Chicago Community H.S. |
| 10 | 13 | 14 | 11 | 5 | 16 |

Source: IHSA

There are six IHSA conferences with a total of 59 high schools, of which 23 are located in Kane County. The Upstate Eight Conference has the most schools with 16 and has 11 schools located in Kane County, which is the most of any conference. Settler's Hill has the opportunity to host sectionals for each of the five conferences in addition to the events held schools.

Schools such as Kaneland, St. Charles East, St. Charles North, West Aurora and Aurora Central Catholic host annual cross-country events at various locations throughout Kane County.

The following table shows the Kane County sites used for cross-country events.

Table 2

| Kane County High School Cross Country Sites | | | | |
|---|-------------|------------------------------|---|--------------------|
| Name | City | Distance From Settler's Hill | Events | Course Type |
| Aurora (Marmion Academy) | Aurora | 6 | Royal Cadet Invite | High School Campus |
| St. Charles East High School | St. Charles | 7 | IHSA Sectional | High School Campus |
| Waubonsie Valley High School | Aurora | 13 | Aurora City Meet | High School Campus |
| Kaneland High School | Maple Park | 13 | Eddington Invite, IHSA Sectional | High School Campus |
| Burlington Central High School | Hampshire | 18 | Central Invite, Rocket Invite, Genoa Kingston Matt Walter Invite | High School Campus |
| LeRoy Oakes Forest Preserve | St. Charles | 8 | Leavey Invite, St. Charles North Invite, UEC Meets, IHSA Sectionals | Forest Preserve |
| Oakhurst Forest Preserve | Aurora | 10 | Aurora Central Catholic Classic | Forest Preserve |
| Elburn Forest Preserve | Elburn | 13 | Kaneland Invite | Forest Preserve |
| Robert I Stuart Sports Complex | Aurora | 13 | West Aurora Stampede | Other |
| Lord's Park | Elgin | 15 | Elgin Cross-Country Classic, UEC Conference Meet | Park |

Source: HSP, Various Facilities

The following figure shows the locations of the IHSA sanctioned courses.

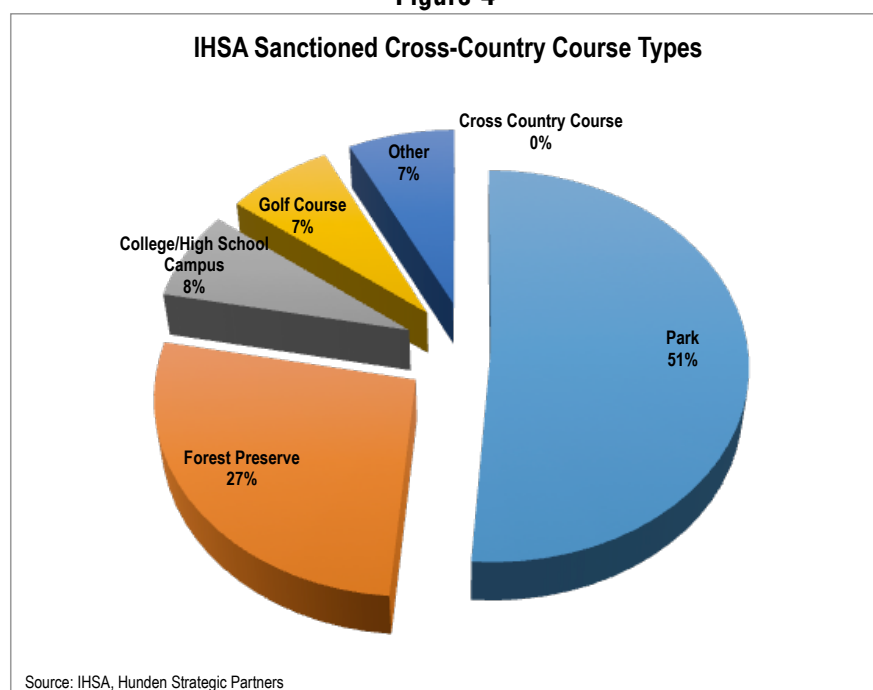
Figure 3



As the map shows, the majority of the sanctioned cross-country courses are in the northeastern portion of the state, within a 60-mile radius of Settler's Hill. These courses are in line with the general population distribution across the state, as many of the larger high schools and universities are located in the Chicagoland area.

The following table shows the breakdown of course types among the ISHA sanctioned courses.

Figure 4



There are 41 sanctioned cross-country courses throughout the state of Illinois. More than half of the venues are parks, followed by forest preserves, school campuses, and golf courses. There are no dedicated cross-country courses used in the state of Illinois for high school events.

Cross-country stakeholders in the area are enthusiastic about a potential dedicated cross-country course on Settler's Hill, but there are concerns. Cost is the primary factor that influences coaches decisions to host events, and parks are currently charging very little to rent out their venue. In addition, many coaches have scheduled events years in advance, and starting a new event takes time and effort that many schools are not willing to commit. The physical layout of the course provided some hesitations as well. Temperatures can be in the 80s during early season events, making sufficient tree cover for athletes and other covered spectator areas is very important. A few coaches also mentioned that their goals are to prepare for the state championship at Detweiller Park in Peoria, and the terrain of this venue is vastly different.

Coaches expressed interest because a designated course in Kane County would provide an athlete and fan experience that is currently unavailable in the market. A well-groomed terrain, sufficient parking, and easy event set-up are attractive features to coaches and event organizers.

Relevant Cross-Country Courses

This section identifies and profiles selected comparable and competitive cross-country courses, and the corresponding regional and national events to better understand those facilities. These cross-country courses, located in the Midwest and throughout the U.S., host meets at the national and regional level, while also hosting local user groups and events. These facilities are likely to continue to compete with a new Kane County facility on national levels of participation, however, not as much on a local level. The analysis will also look at Kane County's position in relation to these facilities to identify the opportunities within the region's competitive market.

The following table shows an overview of relevant cross-country courses in the region and some nationally significant courses. HSP has identified and will discuss profiles of each, particularly some of the most competitive and significant.

Table 3

| National Comparable/Competitive Cross Country Courses | | | | |
|---|--------------|-------|----------------------|----------------|
| Name | City | State | Course Type | Hosts National |
| Lavern Gibson Championship CC Course | Terre Haute | IN | Cross Country Course | ✓ |
| Mt. SAC Cross Country Course | Walnut | CA | Cross Country Course | ✓ |
| Rim Rock Farm | Lawrence | KS | Cross Country Course | |
| UW-Parkside: Parkside Cross Country Course | Kenosha | WI | Cross Country Course | |
| UW-Madison: Zimmer Championship Course | Verona | WI | Cross Country Course | |
| Balboa Park | San Diego | CA | Park | |
| Franklin Park | Boston | MA | Park | |
| Holmdel Park | Holmdel | NJ | Park | |
| Van Cortlandt Park | Bronx | NY | Park | ✓ |
| Belmont Plateau | Philadelphia | PA | Park | |

Source: HSP, Various Facilities

A new championship-level cross-country course at Settler's Hill will be competing with several very high quality courses in the region and across the country. The University of Wisconsin has prepared for the latest generation of cross-country course, which includes large-scale amenities for spectators and television and media broadcasting. To the south in Terre Haute, Indiana State University is home to the current sport leading competitive course. Even closer to Kane County, UW-Parkside has a legendary course, although not as formidable competition as it once was due to newer advancements in spectator-friendly cross-country events. For this reason, it will be critical for a new cross-country course to market itself to local and regional user groups, event organizers and especially, high school and college teams in the area.

While subtle and considerable differences are found between the profiled facilities, each course's business model is focused on scheduling large tournaments, and as many as possible, with multiple teams and hundreds of runners. According to the U.S. Track and Field Cross Country Coaches Association (USTFCCCA), team entry fees are generally \$110 per membership team and \$160 per non-membership team and USTFCCCA events.

From a facility standpoint, a new Kane County venue must offer amenities that include concessions, restrooms, and merchandise/concessions area for spectators, all of high quality. Other expected amenities include a scoreboard for the top runners and their times, along with a public address system that brings to mind the feel of a major sporting event that can create a buzz within the community and draw larger crowds, and more teams to the tournaments. As for the course itself, it is becoming more necessary to provide a groomed, grassy running course with hills and valleys, curves and straightaways, with various vistas if possible, and easily accessible points for crowds to witness the race. It is preferable to create a visually interesting course with a smooth grass surface for television camera-outfitted vehicles to be able to drive on the course ahead of runners.

Most of the profiled courses do not provide parking. Settlers Hill could rise to near the top of the cross-country community simply for providing ample parking close to the starting and finishing line. The visitor experience is a strategic and very important element to the success of these facilities. Indiana State University made the spectator experience a first priority and is reaping the benefits across the city, with full hotels and restaurants during race weekends. Kane County can follow a similar strategic plan and still be one of the nation's first and outstanding examples of this new breed of cross-country course. The Chicagoland area is ripe for a development of this kind due to its strong high school athletics programs and being the third largest population center in North America after New York and Los Angeles. Additionally, the Kane County area offers abundant accommodations, restaurants and shopping within a few miles of Settler's Hill for visitors to enjoy during off-running times.

The success of a new cross-country course at Settler's Hill will depend on how well the facility's management can meet the standards set by these comparable facilities as well as market a high quality and unique opportunity for users. For a community to be competitive in the sports tourism industry, an innovative and immaculate course alone will not suffice. Clearly, a destination package must include quality onsite amenities as well as a suitable hospitality package.

Championship and High Profile Event Opportunities

National and regional cross-country events will play a vital role in the economic and fiscal impact that the Settler's Hill Cross-Country Course will have on Kane County. These events generate significant visitation, spending, room nights and other impacts to the community. These events tend to attract non-local participants and their families that require overnight accommodation, unlike those visitors within a 100-mile radius who tend to make daytrips.

There are a variety of courses throughout the country and the Midwest that are hosting USA Track and Field and NCAA events. A course with a dedicated management entity that has proven itself as an elite cross-country venue and can complete the bid application process would be eligible to host one of these high profile and championship events.

However, Nike and Foot Locker are currently hosting their annual regional events at the same locations, Lavern Gibson Championship Cross-Country Course in Terre Haute and Wayne E. Dannehl Course at University of Wisconsin-Parkside. These courses have developed reputations as elite venues in the sport, and a potential course at Settler's Hill will need to do the same in order to attract these high profile regional and national events.

Recommendations

Strengths (Existing attributes that are helpful to the Project)

- **Successful Regional Partners/Tenants.** Event organizers in the area are well-known for their respective experience in cross-country and have reputations of providing participants with the opportunity to improve their skills while competing on the high school, collegiate and post-collegiate levels. These groups have expressed an interest in hosting events or expanding operations if rental elements such as facilities, rental agreements and availability can be agreed upon.
- **Sizing/Settler's Hill Cross-Country Course Plan.** The physical plan of the Settler's Hill Cross-Country Course meets the requirements of sanctioning bodies, and if implemented will provide a venue for recreational, state and events that will be one of the best in the region. Various regional groups have confirmed the recommended facilities would meet the need for the majority of their events.
- **Settler's Hill Location.** The current site for the project was already owned by the County prior to the project so there is inherent value. There is an economic benefit for the facility at the current site due to lower development cost through repurposing of a former landfill and the elimination of site acquisition.
- **Parking.** Participants are not willing to walk long distances to park, so the availability of more than 2,500 parking spaces is an asset. The existing parking eliminates the need to occupy more land and build parking, which is expensive. Walkable parking also eliminates the logistical challenges of shuttling participants and spectators to and from offsite parking.
- **Large Regional Population.** Kane County is within a very easy driving range of major cities like Chicago, Indianapolis, Madison, Milwaukee and Minneapolis, as well as St. Louis. This population base of 20+ million in just a few hours' drive provides an extensive list of participant and event opportunities.
- **Access.** Chicago has an excellent commuter train system. Three lines of the Metra System end in Kane County, and the Union Pacific West line has a stop in Geneva, closest to the Settler's Hill site. The Geneva stop is located west of Settler's Hill

across the Fox River and is approximately 2.5 miles from the Settler's Hill entrance on E Fabyan Parkway. Although the Settler's Hill site nearly one hour west of Chicago, it is within easy access to arterial interstates, I-88 and I-90.

- **Community Interest.** Interviews with stakeholders in the community reveal a great deal of support for projects that will enhance the county and area, including possible athletic facilities. This was true even of industry stakeholders whose venues included potential competition with a new facility.

Weaknesses (Existing attributes that may hurt the success of the Project)

- **Amenities Incomplete.** Presently, the surrounding walkable area has not been built out, so does not have the retail, restaurants, hotels and entertainment nearby that would provide a better onsite experience and aesthetic.
- **Proximity to Chicago.** Although the site is an approximately one hour drive from Chicago, many local groups expressed the site is far enough outside the downtown Chicago area that they would avoid hosting events due to logistical challenges. Also, visitors traveling by airplane and even by car must travel outside of Chicago, leaving the attractions and amenities that Chicago provides. Even though groups expressed the proximity to Chicago as a challenge and weakness, this is not considered to be a significant weakness for Settler's Hill.
- **Difficult Business Models.** The business models for both indoor and outdoor athletic facilities are difficult to make work without ongoing operating losses. Athletic facilities have the best opportunity to generate operating income if there is a robust event schedule on the weekends and consistent use during the week. Sustaining positive operating cash flows at a cross-country course will be very difficult, so this burden must be mitigated by other revenue sources such as concessions, parking and rentals. In comparable cases, the public sector contributed to the development through incentives, infrastructure costs and other funding mechanisms to fund the project during development and with ongoing operating support.

Opportunities (External conditions that will help the feasibility of the Project)

- **Development of Events.** Developing partnerships with local organizations, high school and universities will increase the ability to develop, manage and conduct several events per year that will bring participants and spectators from around the region and potentially the United States.
- **Event Growth.** Currently, many events are limited in size by Forest Preserve sites. Events must limit the number of entries to ensure there is safe utilization of the sites. Additionally, events have been stopped due to over-crowding from spectators that limited site access for emergency vehicles. Settler's Hill would provide existing events a larger venue that would accommodate more team and individual entries, while accommodating large amounts of spectators. The site offers events the opportunity to grow, which would benefit both the event and Settler's Hill financially.

- **Quality of Existing Demand.** The facility as planned will be one of the largest and highest-quality facilities in the region, with a championship-caliber course as well as concessions, parking and other facilities.
- **Economic Development of Surrounding Areas.** Because of the potential for large regional events, as well as the traffic from local and other events, the area surrounding Settler's Hill has the opportunity to develop, especially projects such as hotels and restaurants, retail and specialty services like sports health facilities.
- **Other Possible Partners.** Kane County and the surrounding area are home to many other groups and organizations that may want to partner or use the course. Local groups such as the local school district, student organizations and non-affiliated running organizations may want to practice or hold events at Settler's Hill.

Threats (External conditions that are a threat to the feasibility of the Project)

- **Market Saturation.** Many events around the state already exist, and the organizations and schools that sponsor and manage those events make profits from the events for their programs. Events in Kane County and the surrounding area will want to continue with their events even though the Settler's Hill Cross-Country Course may wish to hold an event on the same day. It is assumed that event organizers may be hesitant, at least in the first few years, to relocate tournaments or events if partnerships have been well established with facilities, sponsors and local businesses at the current location.
- **Scheduling Conflicts.** The intentions of the facility are to provide an environment for the community to achieve an active lifestyle. The facility will also want to host larger scale and high-profile events that will create economic opportunities and growth. The scheduling of the facilities could become difficult due to these two conflicting goals. Based on conversations with industry professionals, establishing a balance of events, programming and community use to meet the needs of local residents and achieve sustainable operations is very challenging. The more events that are scheduled may minimize the available opportunities for local residents to utilize the facilities in order to keep the course in superior condition.
- **Management/Ownership Structure.** A model that many municipalities use to contain costs and maximize usage is to lease the facility to a private organization that manages the facility on behalf of the municipality. One major advantage to this structure is that the municipality bears no ongoing operational costs. The private group and the locality enter into a long-term operating agreement in which the private group manages the facility and pays a specified amount per month or per year to the locality. Some municipalities receive a percentage of the gross revenue of the facility, while others receive a flat rate to pay for a portion of the cost of development plus a small percentage of revenue. Private groups may retain all entrance fees, concession, rentals and other revenue, and provide maintenance for the facility. There are many variations on this format.

However, in the case of Settler's Hill, it is unlikely the events will generate enough revenue to attract a private group to manage the facility as a revenue-generating enterprise. It is more likely that a non-profit organization of volunteers will be the driving force behind the effort to organize and host events.

- **Competitive Options.** Cross-country courses can be setup and held almost anywhere that can accommodate a course. Forest preserves, parks, golf courses and even school campuses will host events. Although Settler's Hill may offer a high-caliber course option, event organizers may select a more convenient, cost effective and closer venue to host events. Ambitious communities throughout the region may impinge on Settler's Hill market share once it has opened.

Recommendations

Kane County should ensure the proposed cross-country course meets the USA Track and Field course requirements in order to accommodate local, regional and national events. While the reuse of a landfill for a cross-country course is a unique opportunity that has only been implemented in Terre Haute, Indiana, the landfill provides a venue that caters to the participant while providing a spectator-friendly setting. The ability to provide a 360-degree view and ability to watch nearly 100 percent of the course creates an overall experience few venues can achieve. The combination of course and site design along with reputable event management could establish the Settler's Hill Cross-Country Course as one of the premier cross-country destinations in the U.S.

Other Sports Uses on the Same Terrain. Cross-country skiing was concluded to be an unreliable use. There is too much uncertainty about the amount of snow northeastern Illinois will receive as well as the quality of snow cover for event organizers to commit to events in advance. Based on conversations with those in the industry, legitimate cross-country skiing events are not likely to see long-term success here.

Settler's Hill will be an added recreational asset for Kane County residents and visitors. The facility is expected to accommodate passive leisure and recreational uses and will likely be a destination for activities such as walking, jogging, picnics as well as visits to the summit to take in the views. In order to accommodate passive use of Settler's Hill, it is recommended to integrate flexible space areas. Spaces for special events, different types of fitness and exercise classes, programs and activity practices should be added throughout the site that are synergistic with the cross-country course.

The Settler's Hill amenities and activities are meant to yield a lower volume of traffic, and consist of low impact uses that allow visitors to engage in an active lifestyle while maintaining the integrity of the landfill. Settler's Hill makes efficient recreational use of a massive land space for the surrounding community that would otherwise have remained dormant.

Based on multiple significant landfill constraints in terms of site work, landfill cap maintenance and integrity, and ongoing landfill operations and maintenance issues, high impact uses that would cause heavy wear of the landfill surface is not recommended. More active or commercial uses would likely impact or jeopardize the integrity of the landfill cap. It is recommended that use

of Settler's Hill be limited to uses such as cross-country running and other passive recreational uses. In addition, other high impact uses on the same terrain would also threaten the quality of the cross-country running course.

The development of the cross-country course should include the following components in order to optimize Settler's Hill's position in the market and respond to the market that wants to compete at a premier cross-country course.

- A well routed and defined course for runners and viewers alike
 - If a course is well routed and defined the runners can easily decipher the route and direction of the course path. In addition, a well-defined course enables the runners to know where they are located in the race, both distance wise and in relation to other runners. Flag strips, ropes, netting, arrows, spectator formations, and racing staff often aid runners in going the right direction. However, an extraordinarily well-defined path may include edging of hills, trees, or tall grasses.
 - A well-routed course necessitates little or no path crossing for the viewers or coaches. Crossing the course path is difficult and hard to maneuver back and forth for the spectator and also distracts the runners. A well-routed course for viewers allows for minimal spectator movement while still providing a view of many parts of the race.
 - A well-routed course also allows viewers, coaches, and officials the opportunity to locate themselves in less crowded viewing areas. The ability to seclude oneself in a less crowded area creates an opportunity for coaches or other viewers to be heard and to aid the runners in what is going on behind them. Creating such an opportunity also allows supporters to help and cheer for the runners through more isolated areas of the race.
 - Maps, signs, or well-defined pathway markers guide spectators. Maps or signs aid spectators in selecting the best viewing location(s) for their needs, and desires.
- Viewer friendliness
 - Viewer friendliness is present in a course that provides as many viewing opportunities possible no matter what the land dictates. In addition, a course that offers easy access to the viewing points offers elements available in a viewer friendly course. For some spectators, courses that require little to no movement to see the entire, or almost the entire race, is what creates a pleasurable course.
- A course with a distinctive atmosphere and has a "sense of place."
 - Many elements play into capturing a unique and desired sense of place. The excitement, motivation, and sensations which an athlete, spectator, or coach may feel is surrounding or captivating them will help establish a reputation for the course.

- A strong and desired sense of place is achieved by utilizing the site's natural characteristics, its surroundings, and by capitalizing on elements that make a course unique and beyond comparison.
- Fast and refined courses
 - An uncomplicated course is one that has very few, if any, challenging components.
 - Courses susceptible to fast times may vary in hill length and height, elevation change, and featured small obstacles. Firm ground, whether grass, gravel, or dirt, in addition to minimal obstacles adds to the ability of attaining faster times. These courses may or may not be highly manmade.
- Well organized, designed, and planned facilities
 - A course consistent with well-planned facilities consists of restrooms near the beginning of the race, as well as other nicer restrooms, benches, and possibly shelters for severe weather.
 - The design of the course has considered official, coach, viewer, and athlete movements, camera setup locations, power locations, a well thought out start/finish area, and other conveniences. In addition, parking for visitors and athletes will be well defined and signs or other maps will be used to help visitors locate the race course.
 - The course design has optimal viewing and sight lines that would allow events to be televised. Spectator areas are mostly on a high ground above the course, between the starting and finishing line, so that nearly the entire course can be seen from the viewing grounds.
- Safety
 - Safety for cross country athletes appears in many forms, although the most common safety issues are usually thought to be the course structure, terrain, surfacing, and pathway configuration. Safe courses do not have barbed wire crossings, but also obstacles such as extremely uneven surfaces and disastrous downhill sections. In addition, crowd control and abiding by the maximum carrying capacity for runners and viewers alike will significantly add to improved safety.
- Courses designed for the athlete
 - Components such as landmarks for reference, differing terrain and surfacing, varied environments, and other such components can contribute to a course designed to benefit the athlete. Varied environments spawn interest and motivate athletes to discover each successive segment of the race subsequently providing a unique experience throughout each environment. In this way courses offer runners one of the most sport specific aspects of cross-country and athletes experience a continually unfolding experience of new and surprising landscapes.

- Athlete challenge does not mean there are high fences to maneuver or long steep inclines, but that the athlete feels they encountered, responded to, imposing course impediments throughout the race. A course designed for the athlete will create a unique opportunity and experience for the athlete taking part in the race.

Other critical components for the Settler's Hill Cross Country-Course include:

- **Timing Equipment:** Timing equipment is one of the most critical components to races. Onsite timing equipment provides a turnkey solution for event organizers if they don't prefer their own equipment. Additionally, this provides an opportunity for the operator to host its own events in a more efficient manner.
- **Restrooms:** One of the largest event related expenses are portable restrooms. Permanent restrooms onsite will help reduce event costs and provide event organizers with a value-added amenity. In addition, the closer the restrooms are located to the start line the better. Based on feedback from other venues, participants have a tendency to utilize restrooms prior to the start of races and the proximate location provides a needed convenience.
- **Parking:** A common complaint among event organizers is that venues do not have enough parking to accommodate events. Currently there are 2,530 parking spaces at the three adjacent sports venues to Settler's Hill. This is more than what comparable and competitive venues that host local and national events have. However, onsite parking should be provided for event staff and vendors as well as have the capacity to accommodate media vehicles.
- **Concessions:** An efficient concessions operation should be included on the facility. Given that events are often early and can last all day, the concession options should go beyond the basics and provide more robust options, especially until more nearby walkable restaurants are developed.
- **Sponsorships:** Advertising and sponsorship opportunities should be considered as possible revenue source for the Settler's Hill Cross-Country Course. Given the potential revenue amounts associated with advertising, sponsorship and naming rights, these are key factors to help offset operating expenses.
- **Areas for event organizers and staff:** Event organizers need locations for event headquarters to conduct their business and meetings. Also, tournament officials and referees regularly do not have a base location to change or operate from. Two small meeting rooms, with bathrooms.
- **Activation Space:** Offer sufficient space for vendors/concessionaires to operate during events.

Governance. Based on HSP's analysis of the governance, management and marketing structures for cross-country courses, it is recommended that the County and other key stakeholders initiate a more in-depth discussion of how Settler's Hill be managed and operated. Key elements to consider will be the alignment of responsibilities and resources, calendar management, marketing, maintenance, event and operating costs. While dedicated cross-country courses are

few and far between, and the few that are working remarkably well due to a can-do attitude and expertise from both industry professionals and event experts, there may be opportunities to set up structures that can minimize operating deficits and minimize the reliance on outside funding sources.

These types of facilities are businesses and must be responsive to the needs of the market. When well-run, they can generate net income for the owner. If treated as a public amenity, they can cause significant financial deficits, which would be covered by the owner – in this case the County and/or Forest Preserve. As such, it is recommended a separate enterprise entity should be created or contracted to operate the facility. The goal for the facility will be to both generate economic and fiscal impacts as well as maximize revenue and minimize expenses.

However, the limited number of events at Settler's Hill and resulting potential revenue will likely not be lucrative enough to attract a for-profit operator to manage and drive revenues. The investment into operations, marketing and management will not justify the expected revenue generation from the facility. As a result, a non-profit and volunteer-based management operation will be the most likely situation similar to the LaVern Gibson Cross-Country Course. The Terre Haute, Convention and Visitors Bureau, Indiana State University and other area organizations provide volunteers and support to operate the facility. The local tourism entities in Kane County, should form a symbiotic relationship with area cross-country organizations and organizing committees to orchestrate tournament bids, housing (hotel) management and destination packages that funnel spending and impact to Kane County hotels and other businesses.

These proactive, market-based and tourism-responsive steps will help Settler's Hill succeed as a competitive market-based operation, even if owned publicly.

Demand and Financial Projections

HSP provides estimates of performance for different categories of uses. The projection model utilized assumes that Settler's Hill will be used primarily for cross-country and outdoor race events, but may host an occasional other low-impact sporting or non-sporting event. The facility has been designed to not only accommodate but also attract area users, organizations and high-profile events. Conversations with leadership of local athletic organizations, high school and university athletic department staff, as well as civic and business stakeholders have all suggested there is desire for the Project, but it will be a very niche development and use. Based on feedback provided by local and regional stakeholders, the demand and financial projections are based on the following assumptions:

- The 240-acre Settler's Hill site will be designed to meet course specifications of USA Track and Field. The course will be able to accommodate all age and competition levels from a local, regional and national level.
 - The course will be able to accommodate 2K, 3K, 4K, 3-mile, 5K, 6K, 8K, and 10K races.
 - All runners will be equidistant from the start line to the first turn.

- The first turn will be 500 meters due to site constraints.
- The course width will not be less than ten meters wide and a one-meter wide obstacle-free zone will exist on the outside and inside of the course.
- The last 200 meters of the course will be straight, flat and at least ten meters wide.
- The cross-country course will be owned by Kane County however, operated and marketed by a third-party entity that will have prior experience and knowledge in organizing, securing and executing cross-country events.
- There are no primary tenants that would have priority on dates or times of use during the year.
- The model includes the assumption that the cross-country course captures a rental rate for use of the facility.

The Settler's Hill site is expected to attract and host a variety of cross-country and outdoor race events and has the potential to host one or more local groups, such as high school and collegiate cross-country programs. No local tenant groups have been assumed at this point. The Settler's Hill Cross-Country Course is expected to accommodate a combination of local and possibly regional and national events, depending on the level marketing efforts as well as commitment from volunteer stakeholders. Based on the programming levels of the course, there are opportunities to accommodate unmet demand and capture demand that is currently leaving the area or using other venues such as forest preserves, parks and golf courses.

The assumptions for the event demand are as follows:

- **Open Events.** Registration classifications shall have no maximum age limit. In men's and women's long distance running, the Open classification allows athletes 16 years and older on the day of the competition. In Open men's race walking and all other Open women's competition, athletes are allowed to be 14 years or older on the day of the competition to participate.
- **Youth Events.** The Youth classification is limited to athletes who have not attained 19 years of age as of the final day of the National Junior Olympic Track and Field meet of the year of competition.
- **Masters Events.** In Track and Field and Race Walking, the Masters classification is limited to athletes who are at least 35 years old on the first day of the event. In Long Distance Running, the Masters classification shall be limited to athletes who are at least 40 years old on the first day of the event.
- **High School Events.** These events will include high school regular season cross-country meets and invitationals. High school events include post-season events such as regionals, sectionals and conference championships. These events occur between the months of August and November.
- **Collegiate Events.** These events will include regular season cross-country meets and invitationals for D-I, D-II and D-III athletic programs. Other collegiate events include

post-season events such as conference championships and national championships. These events occur between the months of August and November.

- **Community Runs.** A community or fun run is a friendly race that where participants take part for their own enjoyment rather than competition. Events are usually held to raise funds for a charity, with sponsors providing the revenue to cover organizational costs.
- **Other Low Impact Sporting Events.** This category includes sporting events not related to track and field, and maintains a passive use to stay in accordance with Waste Management site management constraints and the Kane County Forest Preserve District policies. Events may include Frisbee golf competitions, large-scale fitness instructions and others.
- **Non-Sporting Events.** This category includes relatively unique events that are not considered in the other event categories. Events may include festivals, movie-in-the-park and other community-oriented events.

The following table shows the various demand and operating assumptions used to calculate the demand and financial projections.

Table 4

| Settler's Hill Cross-Country Course Demand and Financial Projections | | | | | | |
|--|-------------------|-------------------------------|------------------|-----------------------------|----------------------------------|---------------------------|
| Category | Avg. Participants | Spectators per Participant | Avg. Rental Rate | Concession Spend Per Cap | Parking/Admission per Vehicle | Spectators per Vehicle |
| Existing Events | | | | | | |
| High School | 1,200 | 2.50 | \$3,500 | \$1.00 | \$5.00 | 3 |
| IHSA Sectional | 280 | 8.00 | \$3,500 | \$1.25 | \$5.00 | 3 |
| IHSA Regional | 125 | 8.00 | \$3,500 | \$1.25 | \$5.00 | 3 |
| Collegiate | 450 | 1.30 | \$4,000 | \$1.00 | \$5.00 | 3 |
| Community Runs | 500 | 2.00 | \$3,000 | \$0.50 | \$5.00 | 3 |
| New Events | | | | | | |
| High School | 800 | 2.00 | \$3,500 | \$1.00 | \$5.00 | 3 |
| Collegiate | 450 | 1.30 | \$4,000 | \$1.00 | \$5.00 | 3 |
| Community Runs | 400 | 2.00 | \$3,000 | \$0.50 | \$5.00 | 3 |
| Open | 1,200 | 1.80 | \$4,500 | \$0.75 | \$5.00 | 3 |
| Youth | 1,000 | 2.00 | \$4,500 | \$1.00 | \$5.00 | 3 |
| Master's | 400 | 1.30 | \$4,500 | \$1.00 | \$5.00 | 3 |
| Other Low Impact Sporting Events | 250 | 1.25 | \$4,500 | \$0.25 | \$5.00 | 3 |
| Non-Sporting Event | 1,500 | 1.30 | \$4,500 | \$1.25 | \$5.00 | 3 |

Source: Hunden Strategic Partners

The following table shows the number of annual events assumed for each event type.

Table 5

| Projected Schedule of Events by Category and Year | | | | | | | | | | |
|---|----------|----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| Category | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 | Year 6 | Year 7 | Year 8 | Year 9 | Year 10 |
| Existing Events | | | | | | | | | | |
| High School | 1 | 1 | 1 | 2 | 2 | 2 | 2 | 3 | 3 | 3 |
| IHSA Sectional | 1 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 |
| IHSA Regional | 1 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 |
| Collegiate | 0 | 0 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| Community Runs | 1 | 1 | 1 | 1 | 2 | 2 | 2 | 2 | 2 | 2 |
| New Events | | | | | | | | | | |
| High School | 0 | 0 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| Collegiate | 0 | 0 | 0 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| Community Runs | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| Open | 1 | 1 | 1 | 1 | 2 | 2 | 2 | 2 | 2 | 2 |
| Youth | 0 | 0 | 0 | 0 | 1 | 1 | 1 | 1 | 1 | 1 |
| Master's | 0 | 0 | 0 | 0 | 0 | 1 | 1 | 1 | 1 | 1 |
| Other Low Impact Sporting Events | 0 | 0 | 0 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| Non-Sporting Event | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| Total | 7 | 9 | 11 | 14 | 17 | 18 | 18 | 19 | 19 | 19 |

Source: Hunden Strategic Partners

As shown, the number of events is projected to increase from seven in year one to 19 by stabilization in year eight, with each event being one day. Of the events, high school, collegiate and community runs are expected to relocate some existing events in the area to Settler's Hill. High School events are expected to increase to eight by stabilization. Additionally, it is assumed Settler's Hill will secure open, youth and master's events as well.

The projections assume Settler's Hill will be primarily used for high school events, while efforts will be made to secure collegiate, large destination events and championships. Additionally, community runs are expected to be limited in order to keep the course in like-new condition for high school, collegiate and championship events.

The next table shows the total number of visitors (participants and spectators) expected at Settler's Hill.

Table 6

| Category | Projected Attendance by Category and Year | | | | | | | | | |
|----------------------------------|---|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 | Year 6 | Year 7 | Year 8 | Year 9 | Year 10 |
| Existing Events | | | | | | | | | | |
| High School | 4,200 | 4,242 | 4,284 | 8,655 | 8,741 | 8,828 | 8,917 | 13,509 | 13,644 | 13,780 |
| IHSA Sectional | 2,520 | 5,040 | 5,040 | 5,040 | 5,040 | 5,040 | 5,040 | 5,040 | 5,040 | 5,040 |
| IHSA Regional | 1,125 | 2,250 | 2,250 | 2,250 | 2,250 | 2,250 | 2,250 | 2,250 | 2,250 | 2,250 |
| Collegiate | 0 | 0 | 1,056 | 1,066 | 1,077 | 1,088 | 1,099 | 1,110 | 1,121 | 1,132 |
| Community Runs | 1,500 | 1,545 | 1,591 | 1,639 | 3,377 | 3,478 | 3,582 | 3,690 | 3,800 | 3,914 |
| New Events | | | | | | | | | | |
| High School | 0 | 0 | 2,497 | 2,547 | 2,598 | 2,650 | 2,703 | 2,757 | 2,812 | 2,868 |
| Collegiate | 0 | 0 | 0 | 1,066 | 1,077 | 1,088 | 1,099 | 1,110 | 1,121 | 1,132 |
| Community Runs | 1,200 | 1,236 | 1,273 | 1,311 | 1,351 | 1,391 | 1,433 | 1,476 | 1,520 | 1,566 |
| Open | 3,360 | 3,427 | 3,496 | 3,566 | 7,274 | 7,419 | 7,568 | 7,719 | 7,874 | 8,031 |
| Youth | 0 | 0 | 0 | 0 | 3,247 | 3,312 | 3,378 | 3,446 | 3,515 | 3,585 |
| Master's | 0 | 0 | 0 | 0 | 0 | 1,016 | 1,036 | 1,057 | 1,078 | 1,099 |
| Other Low Impact Sporting Events | 0 | 0 | 0 | 597 | 609 | 621 | 633 | 646 | 659 | 672 |
| Non-Sporting Event | 3,450 | 3,554 | 3,660 | 3,770 | 3,883 | 3,999 | 4,119 | 4,243 | 4,370 | 4,501 |
| Total | 17,355 | 21,294 | 25,147 | 31,507 | 40,523 | 42,181 | 42,857 | 48,052 | 48,804 | 49,572 |

Source: Hunden Strategic Partners

Total visitation is projected to increase from approximately 17,300 to more than 48,000 by stabilization, depending on the number of events held. High school and open events will be the primary drivers for visitation.

Financial Projections

The next table is a consolidated estimate of revenue and expense for the Settler's Hill.

Table 7

| Settler's Hill Financial Projection (thousands of inflated dollars) | | | | | | | | | | |
|--|--------------------|----------------|----------------|---------------|---------------|---------------|---------------|---------------|---------------|----------------|
| Item | Fiscal Year | | | | | | | | | |
| | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 | Year 6 | Year 7 | Year 8 | Year 9 | Year 10 |
| Operating Revenue | | | | | | | | | | |
| Rent | \$26 | \$34 | \$44 | \$59 | \$74 | \$82 | \$84 | \$91 | \$94 | \$97 |
| Concession | \$3 | \$3 | \$4 | \$5 | \$7 | \$7 | \$8 | \$9 | \$9 | \$10 |
| Parking | \$17 | \$31 | \$35 | \$50 | \$68 | \$70 | \$70 | \$88 | \$89 | \$90 |
| Total Revenue | \$46 | \$69 | \$83 | \$113 | \$149 | \$159 | \$162 | \$188 | \$192 | \$196 |
| Operating Expense | | | | | | | | | | |
| Fixed | | | | | | | | | | |
| Salary - Permanent Staff | \$68 | \$70 | \$72 | \$74 | \$77 | \$79 | \$81 | \$84 | \$86 | \$89 |
| Benefits - Permanent Staff | \$22 | \$23 | \$24 | \$25 | \$25 | \$26 | \$27 | \$28 | \$28 | \$29 |
| General and Administrative | \$18 | \$19 | \$19 | \$20 | \$21 | \$21 | \$22 | \$23 | \$23 | \$24 |
| Utilities | \$2 | \$2 | \$3 | \$3 | \$3 | \$3 | \$3 | \$3 | \$3 | \$3 |
| Repairs and Maintenance | \$45 | \$46 | \$48 | \$49 | \$51 | \$52 | \$54 | \$55 | \$57 | \$59 |
| Insurance | \$10 | \$10 | \$11 | \$11 | \$11 | \$12 | \$12 | \$12 | \$13 | \$13 |
| Communications | \$2 | \$2 | \$2 | \$2 | \$2 | \$2 | \$2 | \$2 | \$3 | \$3 |
| Advertising | \$20 | \$21 | \$21 | \$22 | \$23 | \$23 | \$24 | \$25 | \$25 | \$26 |
| Misc. | \$3 | \$3 | \$3 | \$3 | \$3 | \$3 | \$3 | \$3 | \$3 | \$3 |
| Total Expenses | \$191 | \$196 | \$202 | \$208 | \$215 | \$221 | \$228 | \$234 | \$241 | \$249 |
| Net Operating Income (Deficit) | (\$145) | (\$127) | (\$120) | (\$95) | (\$66) | (\$63) | (\$65) | (\$46) | (\$49) | (\$53) |
| Deposit to Maintenance Reserve | \$1 | \$2 | \$2 | \$3 | \$4 | \$5 | \$5 | \$6 | \$6 | \$6 |
| Net Operating Income | (\$146) | (\$129) | (\$122) | (\$98) | (\$70) | (\$67) | (\$70) | (\$52) | (\$55) | (\$59) |

Source: Hunden Strategic Partners

The model assumes each user group or event organizer rent to use the facility, however local schools (secondary and post-secondary) generally pay a lower rental rate, similar to how an anchor retail tenant in a mall pays lower rent per square foot as they guarantee consistent usage and demand.

As shown, rental fees are projected to be the largest revenue source, stabilizing at more than \$94,000. Net concessions and parking/admissions make up other significant revenue sources. For concessions, the projections assume a revenue share with the host user group. Concessions are a significant funding source for high school booster programs. The facility shares a minority percentage (15 percent) of gross sales. Parking/Admission fees are expected for all events. The user groups and event organizers would take the risk for and receive most of the revenue for concessions and any merchandise sales. The assumptions for these figures were based on similar facilities and event operations. Given the limited number of events, potential revenue amounts associated with advertising, sponsorship and naming rights were not assumed but are recommended. Additionally, sponsorships for race events, like title rights, are secured by the event organizer since races are one-day events and typically in public spaces.

On the expense side, staffing and facility repairs and maintenance are the two largest items. Other major costs include administrative, insurance and advertising. Events are held during the

mornings and early afternoons, requiring little utilities, if any. In total, the facility is expected to experience a net deficit of \$146,000 in year one and the deficit is expected to stabilize at approximately \$50,000 by the tenth year, if the assumptions in this report are enacted.

Impact Analysis

While the gross operations of the Project will generate sales tax, the critical analysis is to determine the amount of net new spending generated by the Project and what that supports in net earnings, jobs and what it generates in net new taxes.

Fiscal impacts are tax revenues that result from the spending and income related to the activities at the Settler's Hill Cross-Country Course. However, Kane County does not levy any material taxes that would support assumptions for sound fiscal impacts. To the extent the municipalities within Kane County are a home rule unit, the municipalities would be positively impacted. Home rule municipalities may levy additional tax upon all persons who are in the business of selling tangible personal property at retail in their jurisdiction.

The table below shows the summary of impacts from new spending and visits to Kane County.

Table 8

| Summary of Impacts | | |
|-----------------------------------|-------------------|------------------------|
| | 20-Years | Stabilized Year |
| Net New Spending | (millions) | |
| Direct | \$11.8 | \$0.58 |
| Indirect | \$3.2 | \$0.16 |
| Induced | \$3.8 | \$0.18 |
| Total | \$18.8 | \$0.93 |
| Net New Earnings | (millions) | |
| From Direct | \$4.5 | \$0.22 |
| From Indirect | \$0.3 | \$0.01 |
| From Induced | \$0.4 | \$0.02 |
| Total | \$5.2 | \$0.25 |
| Net New FTE Jobs | Actual | |
| From Direct | 10 | 10 |
| From Indirect | 1 | 1 |
| From Induced | 3 | 2 |
| Total | 13 | 13 |
| Construction Impact | (000s) | |
| Total Spending | \$1,506 | |
| Direct Labor Spending | \$1,398 | |
| Job-Years, Actual | 7 | |
| Source: Hunden Strategic Partners | | |

In total, the Settler's Hill Cross-Country Course is estimated to generate nearly \$18.8 million in total spending over 20 years. New earnings are projected to total \$5.2 million over the period, supporting 13 full-time equivalent positions during that time. The construction impact totals more than \$1.5 million in impact from materials spending locally and more than \$1.4 million in spending from earnings as well as seven construction job-years.

Report Layout

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About Hunden Strategic Partners

Hunden Strategic Partners is a full service real estate development advisory practice specializing in destination assets. With professionals in Chicago and Indiana, Hunden Strategic Partners provides a variety of services for all stages of destination development in the following primary areas:

- Real estate market and financial feasibility and financial consulting
- Owner's representation and operating consulting
- Strategy and master planning
- Public incentive analysis
- Economic, fiscal and employment impact analysis (cost/benefit)
- Economic and tourism policy/legislation consulting
- Organizational development
- Research and statistical analysis
- Developer solicitation and selection; Private management company solicitation and selection

Hunden Strategic Partners professionals have provided all of the above services for hundreds of client projects worldwide for the public, non-profit and private sectors. In addition, our professionals have prior professional career experience in municipal and state government, economic and real estate development, real estate law, hotel operations and non-profit management. Over 70 percent of our clients are public entities, such as municipalities, counties, states, convention bureaus, authorities and other quasi-government entities empowered to conduct real estate, economic development and tourism activities.

Limiting Conditions

HSP relied on primary and secondary sources of information for the assumptions made in this report and assumes these sources to be accurate. Assumptions created for the analysis were based on the data available to HSP during the study period as well as professional judgment.

The Project is assumed to be owned and operated in a first-class manner by the parties who have operated similar facilities.

No responsibility is taken for unforeseen events occurring after the date of the analysis, including war and terror attacks, natural disasters and major economic recessions.

This report is intended to be used as a tool for decision-making by the contracting parties related to this Project and for no other purpose.

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PROFILE OF PROPOSED PROJECT AND ASSUMPTIONS

Project Profile

Kane County, (County) has proposed a strategic plan to redevelop the Settler's Hill Landfill that was closed in 2006. The proposed Project has stakeholders, all of whom will participate in the approval process of the Project's final design. The site is owned by the County and operated by Waste Management of Illinois, Inc. (Waste Management). The master plan for the 700-acre complex, which includes both the Settler's Hill and Midway Landfills, was developed by Kane County in conjunction with the Kane County Forest Preserve District. The stakeholders prefer to see the site divided into 90 percent passive and 10 percent active uses.

Waste Management, as the operator is responsible for the operations, maintenance and environmental management of the landfill. The approval of Waste Management is required for every major phase of the cross-country course design and permitting. The Kane County Forest Preserve District is partnering with Kane County on the Master Plan and will approve the final design of the trail system.

Location

The proposed cross-country course on Settler's Hill is located in Kane County, approximately 42 miles west of downtown Chicago or approximately a 1.5-hour drive. Settler's Hill Landfill is located approximately two miles from downtown Geneva. The Settler's Hill Landfill is bounded by rail lines to the north, Fabyan Parkway to the south, the Settler's Hill Golf Course and Fabyan Woods Forest Preserve to the west and Kirk Road to the east. Access to the site is currently from Fabyan Parkway only.

The following figure shows an aerial view of the site location.

Figure 1-1



Site History

Until 2006 the site was the location of the Settler's Hill and Midway Landfills. However, even with the closure of the landfill, Waste Management is still the primary operator of the site and is legally liable during its post-closure care period, which runs through 2037, at a minimum.

Settler's Hill Master Plan

While the plans for the project are not finalized, the current master plan proposes the following:

- Modify the first hole of the Settler's Hill Golf Course to be a driving range.
- Convert Hole 17 of the golf course into two holes.
- Reconfigure the course to obtain returning nine holes on the golf course.
- Possible incorporation of par three instructor holes.
- Development of arena: Rivers Edge outdoor event facility.

The following figure shows the most current Settler's Hill Master Plan. The proposed configuration of the cross-country course is highlighted in green.

Figure 1-2



The following figure is a closer perspective of the cross-country course.

Figure 1-3



Settler's Hill Cross-Country Course Development Plans

The most recent design consideration for the cross-country course is the result of the Weaver Boos Consultants' (WBC) design report that was submitted to Kane County in October of 2014. The plans were drafted with the goal of developing a championship level cross-country course that would serve as the premier location for Illinois high school and collegiate cross-country events. County residents could also use the course when not programmed for scholastic nor competitive events. The location of the site presents several design challenges, primarily that excavation into the landfill cannot occur in order to preserve the integrity of the landfill cap. Therefore, any alterations to the topography of the site must be completed by adding soil material onto the landfill cap.

With input from the USA Track and Field and the Client, it was determined that the course optimally would be designed to have the ability to host 2k, 3k, 4k, 3-mile, 5k, 6k, 8k and 10k races. WBC used the 2013/2014 NCAA Men's and Women's Track and Field and Cross-Country Rules as the guideline. The major requirements for a regulation cross-country course are listed below.

- All runners are equidistant from the start line to the first turn.
- The first turn cannot be less than 600 meters from the start line. However, the NCAA Rules Committee is expected to reduce this to 400 meters, as it is not easily feasible at most existing locations.
- The course width shall not be less than ten meters wide and, if possible, a one-meter wide obstacle-free zone on the outside and inside of the course.
- The last 200 meters of the course must be straight, flat and at least ten meters wide.

The potential incline of the course is another significant design feature that must be considered very closely. The site currently has several areas that are very steep and must be altered to make it possible for a cross-country course to be developed. The design proposes no incline greater than eight percent and any inclines at these levels are to be restricted to the shortest distances possible. Moreover, WBC implemented runner recovery areas, or areas of very little incline, after stretches of the course that would have steep inclines.

The start wedge for the course is proposed to be located in the center of the hill. This was the only configuration that allowed for all categories of races and was feasible given the physical constraints of the site. The design proposes the construction of a parking lot at the northeast corner of the site, which would be accessible via the Fifth Third Bank Stadium north access road. However, the primary event parking is to be in the Kane County Cougar and Forest Preserve District parking lots. Pedestrian trails will lead from the parking lots to the start, prep and viewing areas of the course. Additionally, a shuttle or tram is under consideration to allow for easier travel from the course to the parking lots. Access to the main viewing area will also be possible from Fabyan Parkway to the south, which will use an existing landfill haul road. Lastly, additional pedestrian trails are proposed in and around the site to allow for access to various viewing areas.

Visibility and Sightlines

The provision of adequate and appropriate sightlines for both seated and standing spectators at Settler's Hill is an important part of achieving safe conditions as well as a quality experience. The Settler's Hill Cross-Country Course is designed to provide quality sightlines throughout the venue that will alleviate excessive crowd movement and pressure on ingress and egress areas. The sizeable site will reduce spectator density along the course, while accommodating greater capacities than existing facilities like forest preserves.

A major part of the Settler's Hill experience is watching the cross-country event. The overall experience of the event is affected by the sightlines that will be enhanced by the design and configuration of the course and the overall open hill. The superior views of the events on Settler's Hill will enhance the attractiveness and potential revenue generating opportunities of such events.

The following table from the WBC study provides an initial estimate of the approximate volume of soil that will be needed to create the course to the specifications above. All measurements are in cubic yards.

Table 1-1

| Soil Volume Approximations | | |
|-----------------------------------|-----------------|-------------|
| Area of Fill Description | Quantity | Unit |
| Start Wedge | 35,000 | Cy |
| Prep Area | 7,000 | Cy |
| Course Main Outer Loop | 73,000 | Cy |
| Loop A | 2,900 | Cy |
| Loop B | 500 | Cy |
| Loop C | 4,400 | Cy |
| Loop D | 15,000 | Cy |
| Finish Line | 4,700 | Cy |
| Parking Lot | 22,000 | Cy |
| Subtotal | 164,500 | Cy |
| 20 Percent Contingency | 32,900 | Cy |
| Total | 197,400 | Cy |
| Source: Weaver Boos Consultants | | |

Nearly 200,000 cubic yards of soil are expected to be required for the Project.

Capital Sourcing

The capital sourcing for the proposed project is expected to come from the County and/or the Forest Preserve District. However, specific funding sources have yet to be determined. Initial cost estimates for the construction of the Settler's Hill Cross-Country Course are outlined in the following table.

Table 1-2

| Settler's Hill Cross Country Course Proposed Budget | | | | |
|--|-------------------------|-------------|-------------------|--------------------|
| Description | Approx. Quantity | Unit | Unit Price | Total Price |
| 4" Topsoil (Cross Country Course) | 67,550 | SYS | \$4 | \$270,200 |
| 4" Topsoil (Viewing Area & Trail) | 10,900 | SYS | \$4 | \$43,600 |
| Clean Fill | 217,680 | CYS | \$8 | \$1,741,440 |
| CCDD Fill | 351,600 | CYS | \$0 | \$0 |
| 8" HDPE Culvert | 270 | LFT | \$16 | \$4,320 |
| 8" HDPE Flared End Section | 12 | EA | \$400 | \$4,800 |
| 6'x8' Box Culvert | 120 | LFT | \$152 | \$18,240 |
| Maintenance Road (Agg. Surface Course) | 11,500 | TON | \$27 | \$310,500 |
| Landscape Allowance | 23.5 | ACRE | \$3,200 | \$75,200 |
| Gas System Repair | 15 | ACRE | \$41,950 | \$629,250 |
| Gas Valve Replacement | 6 | EA | \$15,000 | \$90,000 |
| Sump Replacement | 4 | EA | \$45,000 | \$180,000 |
| LFG System CQA | 1 | LSUM | \$100,000 | \$100,000 |
| Subtotal | | | | \$3,467,550 |
| Erosion Control | 2% | | | \$69,351 |
| Contingency | 10% | | | \$346,755 |
| Total | | | | \$3,883,656 |

Source: Weaver Boos Consultants

The cross-country course is estimated to cost \$3.88 million. The budget accounts for potential alterations to the methane gas collection system, course construction, and “dirt loss” that could be associated with the landfill settling during and after completion of construction. Some of the methane gas collection infrastructure may have to be altered or moved as a result of the current plan. Waste Management of Illinois must approve any changes to the gas collection system before any plans can be finalized. The project budget includes two percent erosion control and a ten percent contingency based on the likely settlement of the landfill.

Area Facilities

The proposed cross-country course will complement the surrounding recreational and sports facilities. The Forest Preserve District currently is responsible for the operating agreements for the four sports and recreation venues that are adjacent to the Project. Third party organizations or tenants manage each facility’s day-to-day activities.

Fifth Third Ballpark

Originally opened in 1991 as the Kane County Events Center, the ballpark was renamed the Fifth Third Ballpark in May of 2012. The ballpark is located to the north east of the proposed cross-country course at 34W002 Cherry Lane. The ballpark is home to the Kane County Cougars, previously a Chicago Cubs affiliated Class-A minor league baseball team, but are now affiliated with

the Arizona Diamondbacks. The team moved the franchise from Wausau, Wisconsin to Geneva after the stadium opened. The Cougars have a strong fan base and welcomed their ten millionth fan in 2013. They are the first Class-A minor league baseball team in history to reach that figure.

While the Cougars' exact schedule changes each year, the facility's peak season typically runs from the first week of April until Labor Day. Games are scheduled throughout the week, but management indicated that Thursday through Sunday are the busiest days during baseball season. Games held Monday through Saturday are generally evening games that start at 6:00 pm or later. Sunday games generally commence between 1:00 pm and 2:00 pm. Of the 138 games scheduled for the 2015 season, 70 are scheduled to be home games.

The following figure shows the Fifth Third Bank Ballpark.

Figure 1-4



The following figure shows the annual attendance figures for the Kane County Cougars.

Table 1-3

| Kane County Cougars Annual Attendance | | | |
|--|-------------------|--------------|------------------------|
| Year | Attendance | Games | Avg. Attendance |
| 2005 | 518,394 | 68 | 7,623 |
| 2006 | 500,052 | 68 | 7,354 |
| 2007 | 468,869 | 65 | 7,213 |
| 2008 | 472,596 | 66 | 7,161 |
| 2009 | 400,040 | 65 | 6,154 |
| 2010 | 430,831 | 69 | 6,244 |
| 2011 | 410,262 | 67 | 6,123 |
| 2012 | 391,102 | 70 | 5,587 |
| 2013 | 406,152 | 66 | 6,154 |
| 2014 | 415,571 | 69 | 6,023 |

Source: MiLB

In addition to games, the Cougars host firework shows and entertainment acts before and after games. In 2015, the Cougars announced its Ballpark Concert Series so fans can enjoy live music before the game. A game ticket for concert series dates includes admission to that day's pre-game concert, each of which will take place in the Cougars' music garden at Fifth Third Bank Ballpark. As part of the Cougars' 2014-15 off-season capital improvement projects, a permanent music pavilion was added to the music garden area for concerts as well as non-game-day events. The 2015 Ballpark Concert Series includes:

- **American English** – Saturday, June 6th
- **Mr. Myers Band** – Saturday, June 20th
- **Libido Funk Circus** - Saturday, July 11th
- **Wedding Banned** - Saturday, July 18th
- **Back Country Roads** - Saturday, August 1st
- **Michael St. Angel** - Saturday, August 15th
- **Hi Infidelity** - Saturday, August 22nd
- **16 Candles** - Saturday, September 5th

These non-game events may pose logistical challenges with possible events at Settler's Hill. The potential for overlap between events would create issues with parking and visitor flow for each event. However, the Cougars baseball schedule is determined one year in advance, so scheduling of events can be planned out to avoid potential conflict with events at Settler's Hill.

The IHSA Boys and Girls Cross-Country season starts the second week of August and the first contest may occur the last week of August. As a result, there is likely to be minimal overlap in schedules between the Cougars and the IHSA Boys and Girls Cross-Country seasons. The majority of cross-country events are held on Saturday mornings.

The following table shows the Cougars' 2015 home schedule and special event days.

Table 1-4

| Kane County Cougars 2015 Home Schedule | | | |
|--|-------------|----------|--------------------|
| Date | Day of Week | Time | Special Event |
| 9-Apr | Thursday | 6:30 PM | |
| 10-Apr | Friday | 6:30 PM | |
| 11-Apr | Saturday | 1:00 PM | |
| 15-Apr | Wednesday | 6:30 PM | |
| 16-Apr | Thursday | 11:00 AM | |
| 17-Apr | Friday | 6:30 PM | |
| 21-Apr | Tuesday | 6:30 PM | |
| 22-Apr | Wednesday | 12:00 PM | |
| 23-Apr | Thursday | 11:00 AM | |
| 1-May | Friday | 6:30 PM | Fireworks |
| 2-May | Saturday | 6:30 PM | Fireworks |
| 3-May | Sunday | 1:00 PM | |
| 4-May | Monday | 6:30 PM | |
| 5-May | Tuesday | 12:00 PM | |
| 6-May | Wednesday | 11:00 AM | |
| 11-May | Monday | 6:30 PM | |
| 12-May | Tuesday | 11:00 AM | |
| 13-May | Wednesday | 6:30 PM | |
| 14-May | Thursday | 6:30 PM | |
| 22-May | Friday | 6:30 PM | Fireworks |
| 23-May | Saturday | 6:30 PM | Fireworks |
| 24-May | Sunday | 6:30 PM | Fireworks |
| 25-May | Monday | 1:00 PM | Fireworks |
| 3-Jun | Wednesday | 6:30 PM | |
| 4-Jun | Thursday | 6:30 PM | Fireworks |
| 5-Jun | Friday | 6:30 PM | Fireworks |
| 6-Jun | Saturday | 6:30 PM | Concert, Fireworks |
| 7-Jun | Sunday | 1:00 PM | |
| 8-Jun | Monday | 6:30 PM | |
| 16-Jun | Tuesday | 6:30 PM | |
| 17-Jun | Wednesday | 12:00 PM | |
| 18-Jun | Thursday | 6:30 PM | Fireworks |
| 19-Jun | Friday | 6:30 PM | Fireworks |
| 20-Jun | Saturday | 6:30 PM | Concert, Fireworks |
| 21-Jun | Sunday | 1:00 PM | |
| 2-Jul | Thursday | 6:30 PM | Fireworks |
| 3-Jul | Friday | 6:30 PM | Fireworks |
| 8-Jul | Wednesday | 6:30 PM | |
| 9-Jul | Thursday | 6:30 PM | Fireworks |
| 10-Jul | Friday | 6:30 PM | Fireworks |
| 11-Jul | Saturday | 6:30 PM | Concert, Fireworks |
| 12-Jul | Sunday | 1:00 PM | |
| 13-Jul | Monday | 12:00 PM | |
| 18-Jul | Saturday | 6:30 PM | Concert, Fireworks |
| 19-Jul | Sunday | 1:00 PM | |
| 20-Jul | Monday | 6:30 PM | |
| 21-Jul | Tuesday | 6:30 PM | |
| 22-Jul | Wednesday | 6:30 PM | |
| 23-Jul | Thursday | 6:30 PM | Fireworks |
| 28-Jul | Tuesday | 6:30 PM | |
| 29-Jul | Wednesday | 6:30 PM | |
| 30-Jul | Thursday | 6:30 PM | Fireworks |
| 31-Jul | Friday | 6:30 PM | Fireworks |
| 1-Aug | Saturday | 6:30 PM | Concert, Fireworks |
| 2-Aug | Sunday | 1:00 PM | |
| 11-Aug | Tuesday | 6:30 PM | |
| 12-Aug | Wednesday | 6:30 PM | |
| 13-Aug | Thursday | 6:30 PM | Fireworks |
| 14-Aug | Friday | 6:30 PM | Fireworks |
| 15-Aug | Saturday | 6:30 PM | Concert, Fireworks |
| 16-Aug | Sunday | 1:00 PM | |
| 21-Aug | Friday | 6:30 PM | Fireworks |
| 22-Aug | Saturday | 6:30 PM | Concert, Fireworks |
| 23-Aug | Sunday | 1:00 PM | |
| 30-Aug | Sunday | 4:00 PM | |
| 31-Aug | Monday | 6:30 PM | |
| 1-Sep | Tuesday | 6:30 PM | |
| 5-Sep | Saturday | 6:30 PM | Concert, Fireworks |
| 6-Sep | Sunday | 6:30 PM | Fireworks |
| 7-Sep | Monday | 1:00 PM | |

Source: Kane County Cougars

As shown, the Cougars have 70 home games scheduled in 2015. Of the 70 games, there are 11 Saturday games and 11 Sunday games. Saturday games start at 6:30 pm, which would allow for cross-country events in the morning to use the ballpark's parking before the ballpark is available to visitors before games. However, Sunday games start at 1:00 pm, which would provide challenges to sharing parking facilities.

Fifth Third Bank Ballpark opens one hour prior to game time for all games except those games with pre-game concerts. Gates open three hours prior to game time on dates with pre-game concerts. Tailgating is not permitted at the ballpark or in any of the stadium parking lots. In total, there are eight games scheduled with pre-game concerts and 29 games schedule with post-game fireworks.

The Cougars shut down their outdoor facilities by mid-October to prevent water line freezing, so the Cougar's stadium would not be available through the entire fall cross-country season for events. However, the Cougars would be receptive to awards ceremonies and banquets within their skybox area during the fall cross-country season.

Striker Soccer Facility

The Striker Soccer Facility is located at 1000 South Kirk Road, on the eastern side of the Settler's Hill site. The facility boasts a 50,000-square foot clubhouse and indoor training facility. The Strikers Fox Valley Soccer Club (FVSC) and the Lewis Academy are the current tenants of the facility. The non-profit organization was incorporated in 1989. The club focuses on youth soccer training through high school and college. The FVSC now represents 53 teams, from the U-8 to U-23 age levels and provides an established player development program on a local, regional and national level. Established in 2014, the Lewis Academy for Developmental Excellence is a training program run by the FVSC. The academy is a highly focused skill development program for young athletes under the age of 12.

The following figure shows the exterior entrance of the soccer facility.

Figure 1-5



The peak season for the facility is during the traditional winter months, December through April. The following figure shows the 2015 indoor training schedule.

Figure 1-6

| Strikers F.V. 2015 Indoor Training Schedule | | | | | | |
|---|---|---|---|--------------------------------|--|--|
| Sun | Mon | Tues | Wed | Thur | Fri | Sat |
| 7:00 AM - 12:00 PM Boys Baseball STC | 3:00-4:45 SR Girls | 3:00-5:00 SR Girls | 3:00-5:00 SR Girls | 3:00-5:00 SR Girls | 3:00-4:30 Senior Open Play | 6:00-8:00 AM U14 Girls/ 15 Boys TBD? Keepers (Bill to Confirm) |
| 12:00-1:30 PM U13 Boys (27) | | 5:00-8:30 PM TECH Training (see age groups below) | | 5:00-9:00 PM TECH Training | | 8:00 - 10:00 AM Geneva Foxes Softball |
| TECH Training (see age groups below) | 4:45-6:00 U8 / U9 Girls (20) U11 Girls (25) | 5:00-6:15 U13 Boys (27) | 5:00-7:15 Little Strikers Ball Mastery | 5:00-6:00 U10 Girls (19) | 4:30-5:45 U14 Boys (31) | 10:00 - 1:00 PM Little Strikers Ball Mastery Games |
| 1:30-3:00 PM U13 Girls (35) | 6:00-7:15 U11 Boys (44) | 6:15-7:30 U13 Girls (35) | | 6:00-7:15 U8 / U9 Boys (32) | 5:45 - 7:00 U9 Boys (18) U10 Boys (22) | 1:00 - 2:15PM U8/U9 Girls (20) /U8 Boys (14) |
| 3:00-4:30 PM U11 Girls (25) | | | | | | 2:15 - 3:30 PM U10 Girls (19) |
| 4:30-6:00 PM U12 Girls (27) | 7:15-8:30 U12 Girls (27) U12 Boys (29) | 7:30-8:45 SR Girls | 7:15-8:30 U14 Boys (31) U 14 Girls (22) | 7:15-8:30 U10 Boys (22) | 7:00 - 10:00 Boys Baseball Wasco | 3:30 - 4:45 PM U11 Boys (44) |
| 6:00 - 10:00 PM Boys Baseball Geneva | 8:30-10:00 U15 Boys (A/B 32/48) | 8:45-10:30 U17 Boys 31 | 8:30-10:00 U15 Boys (A/B 32/48) | 8:30-10:30 U17 Boys 31 | | 4:45 - 6:00 PM U12 Boys (29) |
| | | | | | | 6:00 - 10:00 PM Baseball |
| TECH Training: Sunday | | TECH Training: Tuesday | | TECH Training: Thursday | | Keeper Training: Saturday |
| 1:00-2:00 PM U10 Girls (19) | | 5:00-5:45 PM U8/U9 Boys (30) | | 5:00-6:00 PM U11 Girls (25) | | 6:00-7:00 AM u11-u14 Boys/Girls |
| 2:00-3:00 PM U10 Boys (22) | | 5:45-6:30 PM U8/U9 Girls (22) | | 6:00-7:00 PM U12 Girls (27) | | 7:00-8:00 AM u8-u10 Boys/Girls |
| 3:00-4:00 PM U14 Girls (23) | | 7:30-8:30 U11 Boys (46) | | 7:00-8:00 PM U13 Girls (34) | | Senior Training at each session |
| 4:00-5:00 PM U14 Boys (32) | | | | 8:00-9:00 PM U13 Boys (26) | | |
| 5:00-6:00 PM U12 Boys (28) | | | | | | |
| Core Training: Sunday | Core Training: Monday | Core Training: Tuesday | Core Training: Wednesday | Core Training: Thursday | | Core Training: Saturday |
| | 3:00 - 5:00 PM U17 Boys | 5:00 - 8:00 PM U15 Boys | 3:00 - 5:00 PM U17 Boys | 5:00 - 6:00 PM Sr Girls | | 8:00 - 11:00 U15 Boys |
| | 5:00 - 6:00 PM Sr Girls | 5:00 - 6:15 PM U13 Girls | 6:00 - 7:00 PM U14 Boys | | | |
| | | 6:15 - 7:15 PM U13 Boys | 8:30 - 9:30 PM U14 Girls | | | |

As shown above, Monday through Friday the facility is scheduled from 3:00 pm until approximately 10:30 pm. On Saturday and Sunday the facility is scheduled from 6:00 am until 10:30 pm. The facility is primarily dedicated to training, so there are little to no rental opportunities during the indoor winter season. When there are rental opportunities available, the fees are generally negotiated on several factors; therefore management was not able to provide a set rental price.

Given the typical usage patterns, the only overlap for parking purposes would be in the spring and fall, but not likely in the summer.

Fox Valley Ice Arena

Located at 1996 South Kirk Road, the ice arena is near the southeast corner of the Settler's Hill site. The Fox Valley Ice Arena (FVIA) features two ice rinks: one 200-foot by 85-foot regulation NHL rink and one 200-foot by 100-foot International size rink. In total, the rinks can accommodate up to

2,800 spectators. The facility is also home to B&R Sports, a regional sports hockey and skating store, a 14,000-square foot fitness center and Chelios' Pub and Grill. From 2011 until 2012 the ice arena was home to the North American Hockey League (NAHL) Chicago Hitmen Hockey team. As of 2012 the Chicago Hitmen announced that they would not compete in the NAHL hockey season and currently do not use the facility. However, staff at the ice arena is fairly confident the Chicago Freeze NAHL hockey team, which called the facility home from 1997 until 2003, would return to the Fox Valley Ice Arena for the 2015 or 2016 season.

The following figure shows the Fox Valley Ice Arena.

Figure 1-6



The facility is in greatest demand from October 1st through May 31st. During these months the facility operates 19 to 20 hours per day to accommodate training camps, college teams and the Kane County Cougars. Generally the facility is dedicated to games from 2:00 pm to 11:00 pm Monday through Friday and is open for public skate and rat hockey during morning hours. As with the soccer facility, Saturday and Sunday are the busiest days for the facility. Events are generally scheduled from 7:00 am to 10:00 pm. In addition to free skating, college and high school games, FVIA is also home to the Cyclones Amateur Hockey Association. The Cyclones focus on youth hockey development and organizes teams from the Peewee to the Midget CS U-18 competitive level.

Throughout the year individuals may rent out skyboxes for \$50 an hour. The skyboxes are located on the third floor of the facility and are generally used for smaller private events. During the months of June through the first part of September the ice sheets may be rented for \$350 per hour. However, ice sheet rental is not available during the primary hockey league months of October through May.

Settler's Hill Golf Course

The Settler's Hill Golf Course was built on the site of the former Midway Landfill and a portion of the Settler's Hill Landfill. Construction of the first nine holes was completed in 1988, followed by the completion of the second nine holes in 1991. GOLFFVISIONS currently operates the course, but

the land is owned by the Kane County Forest Preserve District. The clubhouse is located off of 919 East Fabyan Parkway. The current master plan proposes several changes to the golf course which include: a driving range, par three instructor courses and an additional return nine holes.

The following figure shows the Settler's Hill Golf Course clubhouse.

Figure 1-7



Area Accommodations

Settler's Hill is situated within one of the most populous counties in Illinois. The cities of Geneva and Batavia are less than 2.5 miles away and West Chicago is approximately 6.5 miles away from Settler's Hill. With many cross-country courses, hotel accommodations and parking are issues. However, there are 2,813 hotel rooms within a five-mile radius of Settler's Hill, which are minutes away from the proposed site.

The following table provides a list of the hotels within five miles of Settler's Hill.

Table 1-7

| Hotel Accommodation Analysis | | | |
|--|-------------------------|--------------|--------------------|
| Property Name | Distance (miles) | Rooms | Chain Scale |
| Comfort Inn & Suites Geneva | 0.8 | 90 | Upper Midscale |
| The Herrington Inn | 1.2 | 61 | Independent |
| Geneva Motel | 1.3 | 26 | Independent |
| Fairfield Inn & Suites Chicago St Charles | 3.0 | 92 | Upper Midscale |
| The Hotel Baker | 3.2 | 54 | Independent |
| Geneva Motel Inn | 3.2 | 83 | Independent |
| Quality Inn & Suites St Charles | 3.2 | 123 | Midscale |
| Best Western Inn Of St Charles | 3.2 | 52 | Midscale |
| Super 8 St Charles | 3.3 | 67 | Economy |
| Country Inn & Suites Saint Charles | 3.6 | 84 | Upper Midscale |
| Hampton Inn Suites Chicago St Charles | 3.7 | 92 | Upper Midscale |
| Courtyard Chicago St Charles | 3.8 | 121 | Upscale |
| Pheasant Run Resort | 3.9 | 473 | Independent |
| Hilton Garden Inn St Charles | 4.0 | 120 | Upscale |
| Q Center | 4.3 | 1,042 | Independent |
| Aurora Fox Valley Inn | 4.6 | 114 | Independent |
| Motel 6 Chicago Southwest Aurora | 4.7 | 119 | Economy |
| Average/Total | 3.2 | 2,813 | - |
| Source: Smith Travel Research, Hunden Strategic Partners | | | |

There are 17 hotels within five miles of Settler's Hill with a total of 2,813 hotel rooms. The two largest hotel properties are the 1,042-room Q Center (a large conference center resort) and the 473-room Pheasant Run Resort. The area has a mix of branded hotels and independently run hotels and resorts. In addition, there are more than 6,500 hotel rooms within ten miles of Settler's Hill.

Parking

The ability to accommodate visitor parking as well as efficiently managing the ingress and egress of vehicles is a critical component to the overall experience. Parking accommodations are an important factor when event organizers are identifying and selecting event sites. Additionally, parking/admission fees can be a major revenue source for events and facilities.

In addition to the parking available at the ice rink, soccer facility and ballpark, the plan also calls for the creation of parking near the official entrance of the cross-country course on the northeast end of the site. The course would be accessed primarily via Kirk Road.

The following table and paragraphs provide a breakdown of the number of parking spaces available during peak and non-peak times for each of the facilities. It includes an assumption of three passengers per car.

Table 1-8

| Settler's Hill Parking Analysis | | | | | | |
|---------------------------------|----------------|----------------------------|------------|---------------------------|--|-----------------------|
| Facility | Parking Spaces | Assumed Parked Visitors | Peak Usage | Peak Parked Attendance | Available Parking during Peak Periods | Charge for Parking |
| Fifth Third Bank Ballpark | 1,900 | 5,700 | 100% | 5,700 | 0 | Yes |
| Fox Valley Ice Arena | 570 | 1,710 | 50% | 855 | 285 | No |
| Golf Course | 95 | 285 | 100% | 285 | 0 | No |
| Fox Valley Soccer Club | 40 | 120 | 50% | 60 | 20 | No |
| Total | 2,605 | 7,815 | - | 6,900 | 305 | - |
| Settler's Hill Parking | 215 | 645 | 100% | 645 | 0 | Yes |
| Total Possible Parking | 2,820 | 8,460 | -- | -- | -- | -- |

Source: Kane County Forest Preserve District, Weaver Boos Consultants, Hunden Strategic Partners

As shown above there are approximately 2,605 parking spaces at the four surrounding facilities. Based on three visitors per vehicle, it is assumed 7,815 visitors can be accommodated by the existing parking spaces. However, due to the limited parking at the golf course, it will most likely not be used as a possible parking location for the cross-country course. Additionally, the golf course currently has just enough capacity for its events and could not accommodate any overflow parking.

The peak usage represents the maximum percentage of parking that is used during each facility's busiest periods. If all four facilities' peak visitation occurred at the same time, there would be approximately 305 potential parking spaces available. The following section discusses the parking needs of each facility.

Based on WBC's initial design estimates, approximately 215 spaces on the northeast corner of the site would be developed to accommodate onsite events as well as provide additional overflow to Fifth Third Bank Ballpark. These spaces would accommodate an estimated 645 visitors. The additional spaces would increase the total parking spaces to 2,820 that would accommodate an estimated 8,460 visitors.

Fox Valley Ice Arena

The FVIA has approximately 570 parking spaces onsite. Management at the ice arena indicated that parking is not an issue for the facility. Management estimated that even peak visitation times during the day, the parking lot is usually no more than half full. Additionally, the soccer and ballpark parking lots are all connected with the ice arena parking lot. The ice arena does not charge for parking and has the ability to accommodate overflow parking from the surrounding facilities. The months of October through May have the highest visitation, with evenings and weekends accounting for most of the activity. The peak season for the ice arena is unlikely to conflict with most events held at Settler's Hill.

The 570 ice arena parking spaces provide nearby and convenient parking accommodations for Settler's Hill. Based on existing visitation and parking needs at the ice arena, events at Settler's Hill would likely have regular access to more than 500 parking spaces.

Fifth Third Bank Ballpark

Fifth Third Bank Ballpark has approximately 1,900 parking spaces onsite. Of the total, 400 are for preferred ticket holders and 1,500 are for general admission ticket holders. The Cougars charge \$10 per game for preferred parking and \$5 for general admission parking. Management stated that 12 to 15 games per season reach full capacity levels. Games that fill parking capacity are typically promotional nights or include fireworks shows or special events. The minor league baseball season runs from April through Labor Day. It should be expected that some of the baseball games may have the potential to impact when events are programmed during the spring and summer months. Additionally, the Cougars management has indicated there would not be an issue with parking on their facilities or for there being a fee charged for parking during Settler's Hill events.

Fox Valley Soccer Club

The indoor soccer facility is a training facility for the Club's teams and programs, and does not hold spectator events like games or tournaments. The facility is primarily used during the winter. The Lewis Academy Director stated that there is no issue with parking and the facility typically has vacant parking spots.

Implications

The proposed design of the Settler's Hill Cross-Country Course would allow Kane County to accommodate local, regional and national cross-country events. The Settler's Hill course would add to the sports destination hub already in place with the four other sports facilities. The other recreational facilities not only help to establish Settler's Hill as a local and regional recreational use destination, they also provide the opportunity to utilize existing infrastructure such as parking. Additionally, the hotel room inventory in the surrounding area has the capacity to accommodate small local events up to large national events. The cross-country course meets the rules and regulations set by USA Track and Field to be a premier competition venue, the permitted use of the site by Waste Management, and satisfies the requirement of blending passive and active uses.

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ECONOMIC & DEMOGRAPHIC ANALYSIS

Local market area characteristics such as population, demographics, a diversified economy, access, quality of downtown and tourist attractions influence the potential demand for a sports venue such as a cross-country course. This chapter profiles Kane County, including an overview of the economic characteristics of the market and the area, as well as a description of downtown.

Overview

Kane County is an Illinois County located in the northeastern part of the state, west of Chicago. It is comprised of 16 townships and 28 municipalities, and is the fifth most populous county in the state of Illinois. Its county seat is Geneva, and its largest city is Aurora, which has a population of approximately 198,000. The county is the most populated along the north-south Fox River. Some of the largest communities and their populations, from north to south, are:

- Algonquin (30,000)
- Carpentersville (38,000)
- West Dundee (7,300)
- East Dundee (3,200)
- Elgin (110,000)
- South Elgin (22,000)

The Tri-Cities area, consisting of:

- St. Charles (34,000)
- Batavia (27,000)
- Geneva (22,000)

And at the southern end of Kane County are:

- North Aurora (17,000)
- Aurora (200,000)
- Montgomery (19,000)

Although it was once primarily an agricultural area with a number of river communities, by the latter half of the 20th century, it had become highly developed as a suburban area of Chicago, and as such, it is one of six counties that form a collar around the city of Chicago, and is therefore referred to as a collar county. Overall, the county consists of 522 square miles of land area.

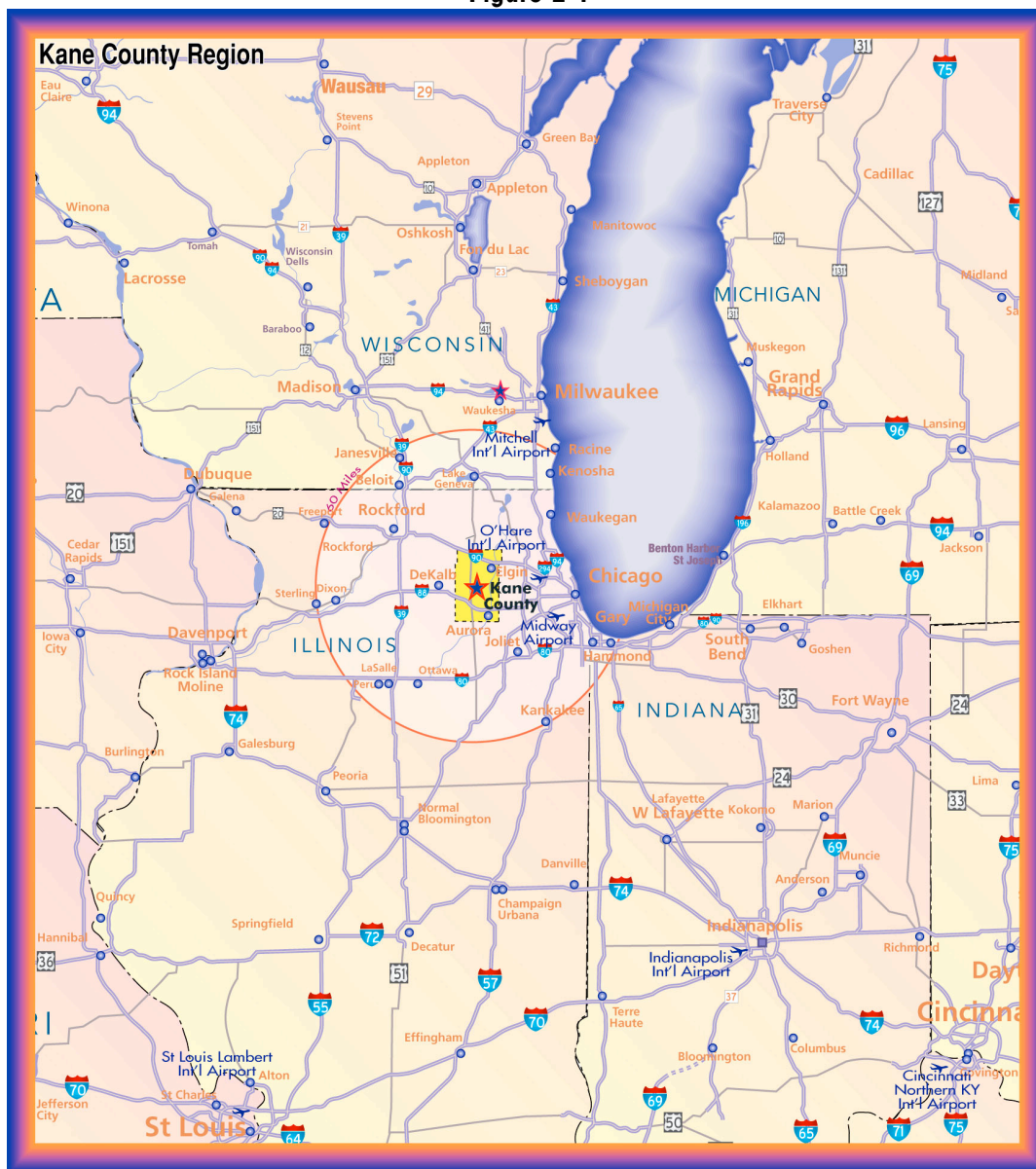
The proximate metropolitan areas (population) to Kane County include:

- Chicago (9,537,289) - 42 miles to downtown. Kane County is part of the Chicago MSA.

- Milwaukee (1,569,659) – 113 miles
- Indianapolis (1,953,961) – 217 miles
- St Louis (2,810,056) – 283 miles
- Rockford, IL (344,623) – 63 miles
- Madison, WI (627,431) – 124 miles
- Des Moines (599,789) – 303 miles
- Davenport-Rock Island-Moline, IA-IL (383,681) – 145 miles
- South Bend-Mishawaka-Elkhart, IN (318,619) – 128 miles
- Peoria, IL (382,114) – 129 miles

The following figure shows a map of the regional area beyond the immediate metropolitan area.

Figure 2-1



Regional Access

Two interstate highways, three U.S. Highways, and eleven state highways serve Kane County. In the northern part of the county, Northwest Tollway I-90, U.S. 20 and IL 72 run east-west connecting Burlington and Huntley to the Fox River Valley and continuing into Cook and DuPage Counties. Interstate 90 runs from the Wisconsin state line near Rockford to the Indiana State Line east of Chicago. The 108-mile interstate traverses through the suburban west of O'Hare

International Airport, through downtown Chicago, and through the industrial southeast side of Chicago.

Many people and corporations locate in Kane County due to its easy access to Chicago's transportation hubs. Chicago is an international hub for business, convention and leisure travel and is extremely accessible by any mean of transport. By car the city is within close proximity to Indiana, Iowa, Kentucky, Wisconsin, Michigan and Missouri; Chicago is within an eight-hour drive of half of the U.S. population. It is also extremely easy to access through O'Hare and Midway International Airports. Chicago's geographic location enables it to be a major draw for visitors, from not only the greater Midwest region, but also from around the world.

Chicago has an excellent commuter train system. Three lines of the Metra System end in Kane County, and the Union Pacific West line has a stop in Geneva, closest to the Settler's Hill site.

The Chicago metropolitan area may be the most connected city in the United States in terms of highways. No less than eight different interstate highways enter the metropolitan area, making the city a trucking and distribution center. Any location within the metropolitan area has quick access to the rest of the Midwest, Upper Midwest, Great Lakes region, and much of the Plains States within an eight-hour drive.

Airport Access

Two airports operate in the city of Chicago: Chicago O'Hare International Airport (ORD) and Midway International Airport (MDW). Located 17 miles northwest of downtown Chicago, O'Hare is the third busiest airport in the United States in terms of passenger counts, but first in the number of total takeoffs and landings in 2014, handling more than 70 million passengers in 2014. The airport includes eight runways and five terminals totaling 182 gates. Terminal 5, also known as Concourse M, is the international gateway, and underwent a \$26 million renovation, completed in 2014. In 2014, a new runway, a runway extension and a new control tower were completed. ORD serves as the headquarters hub for United Airlines and is one of American Airlines most important hubs. The airport has direct service to 210 domestic (153) and international (57) destinations. Only seven other airports in the world can claim the distinction of direct flights to more than 200 cities. The "E" elevated train transit's Blue Line begins its route at O'Hare in an underground station, to downtown Chicago. A new modernizations plan to reduce delays is a \$6 billion capital investment plan to increase the airport's capacity by 60 percent and decrease delays by an estimated 79 percent. One large transformation will be replacing the two southeast-to-northwest runways with new east-west runways, bringing the airport's total of parallel east-west runways to six. At least four planes will be able to land or takeoff at the same time.

Chicago Midway International Airport is the state's second-largest airport featuring five runways and one terminal with three concourses. MDW is mainly served by low-cost carrier Southwest Airlines, but also has several gates leased to Delta. Southwest has grown its service at Midway to the point that it is now its largest focus city. That airline now departs 250 jets to 60 domestic airports daily. In 2011, Midway attracted 21.2 million passengers, a number that has increased

from 15.6 million in 2000 and 2001. The Orange Line elevated train connects passenger to downtown Chicago.

Both of these airports are easily accessible in the Chicago region via interstate highways and connected to downtown by the elevated train system.

General Mitchell International Airport, on the south side of Milwaukee, is about 90 minutes away by car and is often used as a convenient alternative to the busy Chicago airports.

Population

In general, the size of a local population base can help determine the potential demand for many types of developments, including hotels and convention centers.

The table below shows population changes in the United States, the State of Illinois, the Chicago MSA and Kane County.

Table 2-1

| Population and Growth Rates | | | | | |
|-------------------------------|-------------|-------------|-------------|---------------|-------------------------------|
| | 1990 | 2000 | 2010 | 2013 Estimate | Percent Change 2000 - 2010 |
| United States | 248,709,873 | 281,421,906 | 308,745,538 | 316,128,839 | 9.7% |
| State of Illinois | 11,430,602 | 12,419,293 | 12,830,632 | 12,882,135 | 3.3% |
| Chicago-Joliet-Naperville MSA | 8,239,820 | 9,098,316 | 9,461,105 | 9,537,289 | 4.0% |
| Kane County | 317,471 | 404,119 | 515,269 | 523,643 | 27.5% |
| County Pop. As % of MSA | 3.9% | 4.4% | 5.4% | 5.5% | -- |

Source: U.S. Census Bureau

The U.S. population grew by 9.7 percent from 2000 to 2010, while the Chicago-Joliet-Naperville MSA experienced a population increase of 4.0 percent. Within that metro area is Kane County, which experienced a very high 27.5 percent growth, as it lies on the western frontier of Chicago's growing suburban ring. The western prairies in Kane County, like McHenry County to its north, are popular new residential communities. During the same period, Illinois's population increased by 3.3 percent. Kane County's population as a percentage of the MSA has increased to 5.5 percent. The growth of the Chicago MSA and Kane County in particular is a positive sign for the Settler's Hill concept, as a more diversified inventory of attractions and athletic facilities keep the region popular with families, travelers, and corporations that invest in such areas and employ local workers.

Diversified Economy

A healthy and diversified economy provides not only employment and disposable income for a market's residents, but it also helps to insulate an area from economic downturns. Markets that have historically relied on one sector have often had difficulty recovering from market shifts to other sectors, which leads to an overall loss of local income and employment. This situation will

often lead to declining population trends, as has been the case in many industrial cities, as residents move to other areas with better opportunities. Markets with diversified employment can often withstand economic downturns better than those reliant on one industry.

The following table shows the 2013 employment by sector for Kane County.

Table 2-2

| Kane County Employment by Industry - 2013 | | |
|--|------------------|----------------------------|
| Description | Employees | Percentage of Total |
| Total employment | 270,028 | 100% |
| By industry | | |
| Farm employment | 1,144 | 0.42% |
| Nonfarm employment | 268,884 | 99.58% |
| Private nonfarm employment | 237,100 | 87.81% |
| Manufacturing | 32,037 | 11.86% |
| Health care and social assistance | 27,654 | 10.24% |
| Administrative and waste management services | 27,341 | 10.13% |
| Retail trade | 25,055 | 9.28% |
| Professional, scientific, and technical services | 16,284 | 6.03% |
| Finance and insurance | 15,594 | 5.77% |
| Accommodation and food services | 15,201 | 5.63% |
| Other services, except public administration | 14,546 | 5.39% |
| Wholesale trade | 14,514 | 5.37% |
| Construction | 13,562 | 5.02% |
| Real estate and rental and leasing | 10,507 | 3.89% |
| Arts, entertainment, and recreation | 8,568 | 3.17% |
| Transportation and warehousing | 5,315 | 1.97% |
| Educational services | 5,036 | 1.86% |
| Information | 3,875 | 1.44% |
| Management of companies and enterprises | 991 | -- |
| Mining | 542 | -- |
| Forestry, fishing, and related activities | 257 | -- |
| Utilities | 221 | -- |
| Government and government enterprises | 31,784 | 11.77% |
| State and local | 29,126 | 10.79% |
| Local government | (D) | -- |
| State government | (D) | -- |
| Federal, civilian | 1,611 | 0.60% |
| Military | 1,047 | 0.39% |

(D) Not shown to avoid disclosure of confidential information, but the estimates for this item are included in the totals
Source: Bureau of Economic Analysis, Hunden Strategic Partners

Manufacturing, Healthcare and social assistance, Administrative and Waste Management Services, and Retail Trade are the top four industries by employment, accounting for 42 percent of total earnings. Government, particularly state and local government, is one of the largest employment sectors in Kane County, at approximately 10.79 percent.

The area is not dominated by one particular industry or sector. Jobs are split rather evenly between health care, banking, credit card services, food production, government services and the local school systems. One of the most notable employment centers is the Universities Research Association Inc.'s Fermi National Accelerator Laboratory. Fermi is home to the "Tevatron", which, until recently, was the world's most important highest-energy accelerator for elementary particle physics research. The variety of businesses from health care to research labs to banking and credit cards and high tech manufacturing, in addition to the food processing and agricultural industries leads the area to be more insulated from economic downturns than many other cities that rely heavily on volatile industries such as manufacturing or many other single industries.

Income and Housing

The number of employed people and their income levels create a market for real estate developments, including sports and recreation facilities, as well as all manner of commercial developments. Indicators of a market's overall wealth and growth can include trends in its income and employment.

The following table provides data on home ownership, income and retail sales, based on the latest data from the U.S. Census Bureau.

Table 2-3

| Income, Spending and Other Demographic Data | | | |
|---|---------------|-----------|-------------|
| Category | United States | Illinois | Kane County |
| Homeownership rate, 2009-2013 | 64.9% | 67.5% | 75.4% |
| Median value of owner-occupied housing units, 2009-2013 | \$176,700 | \$182,300 | \$223,100 |
| Persons per household, 2009-2013 | 2.63 | 2.63 | 3.01 |
| Median household income, 2009-2013 | \$53,046 | \$29,666 | \$69,530 |
| Persons below poverty level, percent, 2009-2013 | 15.4% | 14.1% | 11.1% |
| Private nonfarm employment, 2012 | 115,938,468 | 5,119,826 | 179,428 |
| Private nonfarm employment, percent change, 2011-2012 | 2.2% | 1.6% | 2.4% |
| Retail sales per capita, 2007 | \$12,990 | \$12,947 | \$11,482 |
| Source: US Census Bureau | | | |

The home ownership rate is higher in Kane County than in the state and the rest of the U.S. as a whole. The median value of owner-occupied homes is nearly \$50,000 higher in Kane County than the value of the national average. Illinois' values are slightly higher than the national average. Real estate values are determined by a combination of factors, including density, demand, income levels and school district strength. Kane County's housing costs are higher than a small city's or rural areas. The income per household and persons per household are also higher than the national average. This is normal for communities that are located in rapidly growing suburban areas of very large cities.

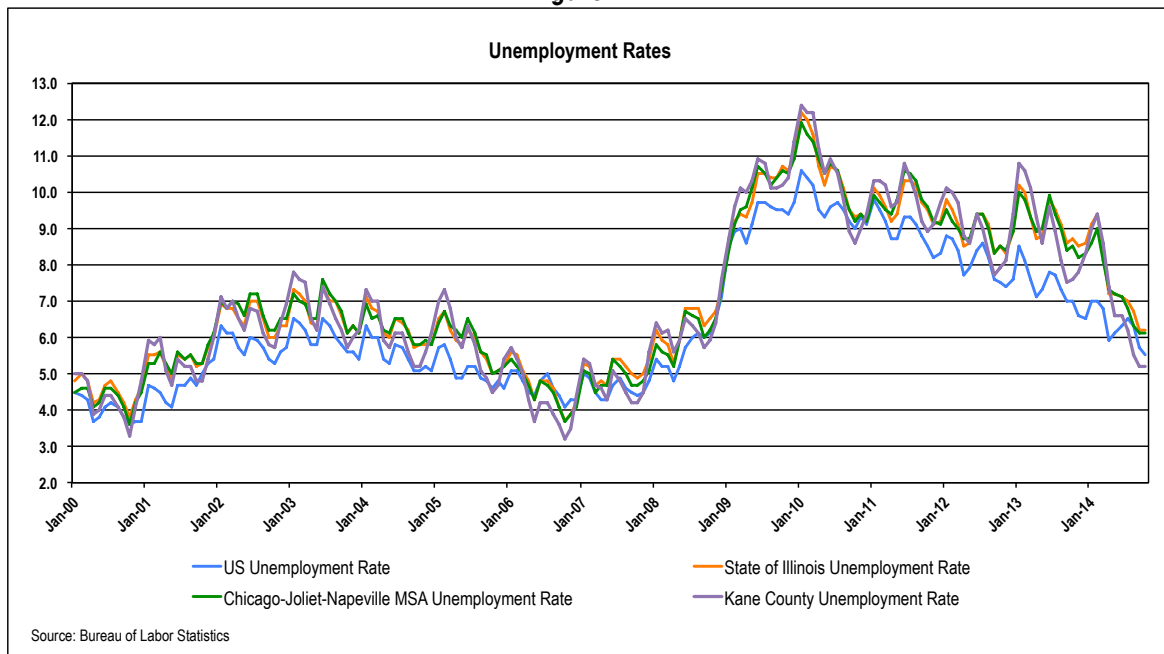
While the income and cost of living is higher in Kane County than the national average, retail sales per capita are slightly lower in the county, with \$11,482. Many people within the county go outside

the county to spend their money, particularly to malls and big-box retail centers in western Cook and DuPage counties. This reinforces the idea that Kane County is generally not a retail destination on par with other suburban counties, even for their own residents, as much as it is a bedroom community more than a shopping destination. This is changing as the county grows in all areas. In time, it will become more of an economic center of activity than it currently is.

Unemployment

The level of employment, as well as unemployment, offers additional insight into the strength of the local economy. The following figure shows the unemployment rate in Kane County, the MSA, Illinois and the U.S. for 2000 through September 2014.

Figure 2-2



Kane County's unemployment rate was consistently higher than the U.S. and approximately equal to the state of Illinois and the Chicago MSA over the 14-year span. The Chicago area was one area hit hard by the residential market collapse in 2008-2010, and new startup residential communities being created out of cornfields, such as what has been happening in Kane County. These communities tended to become overbuilt, or new residents quickly became upside-down in their house investment, owing much more than it was worth, and allowed the banks to foreclose. Some of the worst cases resulted in "ghost subdivisions". For the first time since a brief moment in 2010, Kane County's unemployment rate is lower than not only the Chicago area and Illinois, but also the nation as a whole. This is due in part to the rapid growth of the county, with new businesses, plants, and offices being attracted to the area and providing new employment opportunities in the immediate area.

Corporate Presence

In general, a market's corporations provide stability to a market and generally consistent employment. They also provide demand for various real estate developments, especially hotel facilities. While the area's economy is not dependent on one or two major industries, several individual organizations support a large percentage of the MSA's workforce.

The following table shows the largest employers in the county, by number of full-time employees.

Table 2-4

| Kane County Major Employers | | |
|---|-----------------|-----------------------|
| Company Name | Location | # of Employees |
| Fermi Lab | Batavia | 2,100-2,500 |
| Bank One | Elgin | 1,001-2,000 |
| Delnor Community Hospital | Geneva | 1,001-2,000 |
| Dreyer Cancer Center and Dreyer Clinic | Aurora | 1,001-2,000 |
| Grand Victoria Casino | Elgin | 1,001-2,000 |
| Hollywood Casino | Aurora | 1,001-2,000 |
| Illinois Dept. of Human Services | Elgin | 1,001-2,000 |
| Kane County | Geneva | 501-1,000 |
| Dukane Corporation | St. Charles | 501-1,000 |
| Elgin Community College | Elgin | 501-1,000 |
| Federal Aviation Administration | Aurora | 501-1,000 |
| Metal Technologies Solutions Inc. | St. Charles | 501-1,000 |
| Provena Health Care | Elgin/Aurora | 501-1,000 |
| SKF USA Inc. | Elgin | 501-1,000 |
| Suncast Corporation | Batavia | 501-1,000 |
| System Sensor | St. Charles | 501-1,000 |
| U.S. Can Corporation | Elgin | 501-1,000 |
| Waubensee Community College | Sugar Grove | 501-1,000 |
| Source: Kane County Economic Development Advisory Board | | |

The previously mentioned Fermi Lab is the largest single employer in the county. The next largest employers include two health centers, two casinos, a bank processing center, and the Illinois Department of Human Services. The more varied employment centers follow on the list, and include a can producer, two community colleges, a machine component manufacturer, the Federal Aviation Administration, an outdoor storage solutions company, and several high technology companies that employ more than 500 employees.

Higher Education

The presence of colleges, universities and educational institutions can play a large role in supporting youth and amateur sports facilities as well as serve as a major demand base for events.

The following table shows colleges and universities in the Kane County area.

Table 2-5

| Kane County Area Colleges and Universities | | | | |
|--|---------------------|--------------------|------------------------|---------------|
| Institution | Location | Distance from Site | Highest Degree Offered | Enrollment |
| Aurora University | Aurora, IL | 10.5 miles | Doctorate | 4,946 |
| Elgin Community College | Elgin, IL | 12.2 miles | Associates | 11,285 |
| Wheaton College | Wheaton, IL | 12.5 miles | Doctorate | 2,993 |
| Waubensee Community College | Sugar Grove, IL | 12.7 miles | Associates | 10,721 |
| College of DuPage | Glenn Elynn, IL | 14.3 miles | Associates | 28,627 |
| North Central College | Naperville, IL | 15.0 miles | Masters | 3,048 |
| Benedictine University | Lisle, IL | 17.1 miles | Doctorate | 6,318 |
| Judson University | Elgin, IL | 19.0 miles | Doctorate | 1,170 |
| Ambria College of Nursing | Hoffman Estates, IL | 21.5 miles | Associates | 344 |
| Grand Total | | | | 69,452 |

Source: National Center for Education Statistics

There are three universities and six colleges within the western suburban area. Together, there are more than 69,000 students in the area, the largest being the College of DuPage (COD) with 28,627 students enrolled. The two-year public university offers associates programs in arts, science, engineering science, applied science, general studies, fine arts, and teaching secondary math. Athletics at COD are very strong, including championship teams in track and field, both men's and women's, throughout the 2000s. The COD educates more undergraduate at one time than any other college in the state except for the University of Illinois Champaign-Urbana. Aurora University is a private liberal arts college in Aurora with approximately 3,000 undergraduates and 2,000 postgraduates. Elgin Community College is a public two-year community college offering Associate of Arts degrees, and has more than 11,000 students. Overall, higher education student enrollment figures are significant and an indicator that team sports and personal recreation are an important part of the local lifestyle and will play an important role in the decision to develop a cross-country course at Settler's Hill.

Educational Attainment

The education level of a community's residents is indicative of employment, income levels and long-term economic growth. Highly educated people have more choices in their decision to locate themselves and their families. The higher the education level, the stronger the labor market and the more disposable income that is available for spending.

The following table shows the educational attainment of adults in Kane County.

Table 2-6

| Highest Education Level Attained | | | |
|----------------------------------|---------------|----------|-------------|
| Population Age 25+ | United States | Illinois | Kane County |
| Did Not Complete High School | 7.6% | 6.6% | 9.0% |
| Completed High School | 27.8% | 27.0% | 24.5% |
| Some College | 21.1% | 21.1% | 19.9% |
| Completed Associate Degree | 8.1% | 7.6% | 7.0% |
| Completed Bachelor Degree | 18.4% | 19.8% | 20.6% |
| Completed Graduate Degree | 11.2% | 12.4% | 10.1% |

Source: U.S. Census Bureau

Kane County has a lower percentage of residents with high school diplomas than the United States, and has a lower percentage of residents with almost all levels of any post-secondary and advanced degrees. The one exception is the percentage of residents that have completed their bachelor degree, which is approximately two percent higher than the national average. Graduate Degrees are below that of the state and the U.S. by one to two percent. This suggests an economy that may be dominated by the middle class and industries that utilize such an employment base, but will also be able to support many companies with higher education requirements and the resulting higher incomes, due to the large population.

Chicago Area Attractions

Being part of the Chicago metropolitan area is a benefit to Kane County, as such that nearby Chicago attractions are already well known and popular, making the entire region an attractive place to visit. Tourism in Chicago is bolstered by the continuing growth of attractions.

Several of the listed attractions are discussed below, among others:

Navy Pier – Chicago’s top tourist attraction and the most visited attraction in the Midwest, includes amusements, meeting space, The Chicago Shakespeare Theater, an IMAX theater, two museums, a Ferris wheel and a musical carousel. A renovation to enhance the offerings at Navy Pier is currently underway and is expected to be complete by mid 2016. The changes are to enhance its appeal and keep it relevant and attractive for the next generation of visitors.

Millennium Park – One of Chicago’s most popular tourist attractions since opening in 2004. The development cost \$475 million and is spread over 24 acres of land along Michigan Avenue adjacent to Grant Park. Within Millennium Park is a restaurant and grill, an ice-skating rink open during the winter months, the Lurie Gardens, major public art that are attractions in and of themselves (e.g. Cloudgate and the Crown Fountain) and one of the most sophisticated outdoor concert venues in the country, the Pritzker Pavilion, designed by Frank Gehry.

Shedd Aquarium – Home to more than 200 tanks filled with the world’s largest and most varied aquatic creatures. The John G. Shedd Aquarium also offers banquet space for private events and

has an attached multilevel Oceanarium which houses mammal pools that appear to merge into Lake Michigan.

Field Museum of Natural History – Housing a collection of more than 20 million pieces, including mummies, dinosaur bones, Native American artifacts and other artifacts from around the world, the museum is one of the top five cultural attractions of the City, recording more than 1.3 million visitors annually. Among some of the leading museum exhibits are Sue, the best-preserved skeleton of a Tyrannosaurus Rex ever found and an extensive exhibit of Africa.

Chicago Theaters – Chicago’s theater scene is second only to New York City with more than 300 theater companies in operation. Some of the City’s most renowned theaters include the Bank of America Theatre, Cadillac Palace, Auditorium Theatre, Chicago Theatre and Ford Oriental Theatre, all of which host major touring Broadway shows via “Broadway in Chicago.” Local theaters producing original and other works are extremely popular and critically acclaimed. These include Second City, Steppenwolf, Goodman, Victory Gardens, Lookingglass, Chicago Shakespeare, Drury Lane and the Royal George. The Lyric Opera and Chicago Symphony Orchestra are also world-class and attract thousands annually.

The Willis Tower – Formerly known as Sears Tower, the Willis Tower is the country’s tallest skyscraper and rises to a height of 1,450 feet. At 110 stories, this building attracts more than 1.3 million tourists annually who view the City skyline from the Skydeck on the 103rd floor. In 2009, the Skydeck underwent renovation and expansion, adding retractable glass balconies that extend approximately four feet in “the air” allowing visitors to step on air and experience 180-degree horizontal and vertical City views.

The Magnificent Mile – Running from the Chicago River north to the Gold Coast neighborhood at Oak Street is the stretch of Michigan Avenue labeled “The Magnificent Mile”. This stretch is one of the world’s notable shopping meccas and compares to Rodeo Drive in Beverly Hills, Bond Street in London, New York’s Fifth Avenue and Tokyo’s Ginza.

Chicago Sports – Sports play a central role in the lifestyle of many Chicagoans and attract hundreds of thousands of tourists annually (an estimated 50 percent of Wrigley Field visitors are from outside of Chicago). The 2005 World Series Champion Chicago White Sox play on the City’s south side at U.S. Cellular Field and the National League team, the Chicago Cubs, play on the City’s north side at Wrigley Field, one of the country’s most recognized ball parks. The United Center, home to the Chicago Blackhawks and Chicago Bulls, and Soldier Field, home to the Chicago Bears, also bring thousands of locals and tourists to the downtown area.

The following table shows the major professional sports teams playing in the Chicago area.

Table 2-7

| City of Chicago Sports Teams | | | | | |
|------------------------------|--------|---------------------|-----------------|-----------------|----------|
| Team | League | Facility | 2013 Attendance | 2014 Attendance | % Change |
| Chicago Cubs | MLB | Wrigley Field | 2,642,682 | 2,652,113 | 0.4% |
| Chicago White Sox | MLB | U.S. Cellular Field | 1,768,413 | 1,650,821 | -6.6% |
| Chicago Bulls | NBA | United Center | 896,944 | 890,370 | -0.7% |
| Chicago Blackhawks* | NHL | United Center | 522,614 | 927,545 | 77.5% |
| Chicago Bears | NFL | Soldier Field | 498,864 | 493,449 | -1.1% |
| Chicago Fire | MLS | Toyota Park | 258,880 | 273,292 | 5.6% |

*Strike shortened season: 24 games instead of 41
Source: Various Leagues, Hunden Strategic Partners

Sports attendance in the City on average has decreased, but two teams that saw attendance increases were the Chicago Cubs and Chicago Fire. The Chicago White Sox, playing at U.S. Cellular Field are the team that experienced the largest decrease in attendance, at slightly less than seven percent. The Chicago Blackhawk's would have experienced a 0.7 decrease in attendance if the 2013 average game attendance were applied to a full 41-home game season.

The Fox Valley: Geneva, St. Charles, Batavia and Aurora Attractions

Downtown Geneva Shopping District – More than 100 boutiques, shops and restaurants in this historic and quaint downtown district fill storefronts and Victorian houses.

Fox Valley Repertory in Pheasant Run Resort – Three golf courses accompany this professional theater company and hotel that showcases Off-Broadway musicals, interactive comedies, family shows at Pheasant Run Resort's state-of-the-art Main Stage. Zanies Comedy Club shares the lounge and lobby with the Repertory Theater, featuring live stand-up comedy.

Paramount Theatre – In Aurora's Stolp Island Historic District, the 1931 movie house has been on the National Register of Historic Places since 1986. Today it holds 1,885, although originally it held 2,125 people. Although it was built to be a movie theater, it still had a full stage for Vaudeville, which played on weekends. An early 1980s restoration brought the theater back to its former glory. Recently named one of the Top Ten Theatres in Chicago by the League of Chicago Theatres, the Paramount continues to provide world-class entertainment - including dance, music, Broadway-caliber theatre, and children's programming - for an annual audience of 150,000 patrons from more than 250 communities.

Figure 2-3



Arcada Theatre – The Arcada Theatre is a 900-seat live music venue in downtown St. Charles. It has hosted stars such as Bret Michaels, Pat Benatar, LeAnn Rimes, Joan Rivers and Buddy Guy.

Steel Beam Theater – This 80-seat intimate boutique theater is a highly respected part of the Chicago theater scene.

Norris Cultural Arts Center – Founded in 1978, this arts center is a world-class visual, performing arts venue. Featured are a 1,000-seat, professionally equipped theater, and an exceptional art exhibition gallery.

Fabyan Villa Museum & Japanese Garden – The Fabyan Villa Museum, a 1907 Frank Lloyd Wright redesign, is located in the Fabyan Forest Preserve. It houses unique natural and Asian artifacts from the collection of Colonel George and Nelle Fabyan.

Fabyan Windmill – Is an authentic, five-story, 1850's working windmill located on the Fox River Trail. Volunteer millers serve as docents on weekends.

Garfield Farm & Inn Museum– This is an 1840's farming, inn-keeping museum on 380-acre site with 24 structures and native prairie. Seminars and events are provided including prairie management, antique apple tree grafting, rare breeds, heirloom gardening, antique tool shows, Harvest Days, Candlelight at the Inn, and archaeology excavations.

Illinois Lincoln Highway – The highway is in an Interpretive Gazebo located at 22 S. First Street to learn the significance of the 179-mile highway while enjoying stories of the early Lincoln Highway and its Illinois communities.

Kane County Cougars – The Cougars are a professional minor league baseball, Class-A affiliate of the Arizona Diamondbacks with games and events April to September, played adjacent to the site of the subject of this study.

Mill Creek Golf Club – This 18-hole public facility is not only known for its golf course, but also its golf academy. Wildflowers are abundant on the course. The elevated tees on many holes provide views of the Fox Valley. Amenities include a 9-hole short pitch & putt course, pro shop and clubhouse with banquet facility.

Fermilab – Offers a self-guided tour of the laboratory, the Art Gallery and science and educational displays. Visitors can view the grounds from the 15th floor observation area. Visitors may also visit the Lederman Science Center.

Raging Rivers Waterpark – This Aussie-themed Raging Waves is Illinois' largest outdoor water park. Sitting on more than 40 acres, this family-friendly water park features 17 water slides, a separate kiddie pool area, wave pool, lazy river and 23 private cabanas.

Acquaviva Winery – is located in Maple Park, IL. This family-owned, 40-acre estate vineyard, offers a full-service winery. It includes a tasting bar and a visible winemaking production center.

Creek Bend Nature Center – The nature center offers interpretive displays, hands-on exhibits, bird watching, guided nature hikes, indoor programs, and self-guided activities. It is the Forest Preserve District's environmental hub, and naturalists are frequently on-site.

Prairie Landing Golf Club – Golf Digest Magazine rates the championship public golf course designed by Robert Trent Jones Jr. a 4.5-star course, based on its golf course condition, GPS golf carts, a premier practice facility, full service pro shop, restaurant and banquet.

Hickory Knolls Discovery Center – Features include an indoor turtle pond, wetland exhibit, live animal displays.

SciTech Hands-On Museum – Aurora's interactive science and technology center offers more than 200 hands-on exhibits demonstrating the principles of electricity, weather, astronomy and nuclear energy.

Otter Cove Aquatic Park – A water park with a lazy river, tube and body slides, lap pool, zero-depth entry pool, toddler pool, diving boards, concessions, and sand play area. A unique feature is the splash park with an interactive children's water play area with safety surface.

St. Charles Municipal Building and Plaza – Designed by R. Harold Zook and D. Coder Taylor, this 1940 Arte Moderne building is constructed with a black granite base, white Georgian marble, an 84-foot tower with stained glass windows, pierced grillwork, and a diamond-shaped translucent top.

St Charles Paddlewheel Riverboats – offers daily afternoon sightseeing trips or private charter cruises on the Fox River. Two old-fashioned paddlewheel riverboats are used for scenic cruises.

Phillips Park – Located on more than 325 acres, popular attractions include the Mastodon Gallery, the Sunken Garden, an 18-hole golf course/driving range, the zoo, a 28-acre fishing lake with a one-mile multiple use trail, war memorials and the Winter Recreation Area. Visitors can view a

display of 15,000 flowers of 15 varieties plus a three-tiered fountain and the “Four Seasons” statues that complement this English garden motif.

Implications

Kane County has demonstrated a growing and energetic economic climate over the past decade. With consistent growth, the region tends to weather economic recessions without a significant amount of contraction the way other cities with one main industry can. This is due to the large variety of economic resources and businesses, government work, health care centers, bank, credit card processing centers, and many school systems and colleges that employ teachers and staff. As a part of the rapidly growing western Chicagoland suburbs, the area has historic and well-maintained city neighborhoods that offer quaint older neighborhoods, and new suburban communities in the former prairie fields both east and west of the Fox Valley. Continued growth is likely, due to the variety of employment opportunities, combined with good schools, community and four-year colleges, sports, recreation and cultural offerings.

Overall, the trends in the market are favorable for a cross-country course development, based on the fast-growing regional economy, population and the specific improvements in the immediate sports-themed area around Settler’s Hill. It provides an additional recreational asset for the County that enhances quality of life.

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LOCAL MARKET SUPPLY AND DEMAND ANALYSIS

HSP evaluated the state cross-country venues to determine both the supply of local facilities for events as well as the existing demand to determine if a championship level-course on Settler's Hill is feasible. HSP reviewed the critical characteristics of these competitive courses to determine how competitive a course at Settler's Hill would be in various categories.

Various cross-country courses exist throughout Kane County and the state of Illinois. The majority of these cross-country sites exist in parks, forest preserves, school campuses and golf courses throughout the state.

Kane County Cross-Country Courses

The following table shows the Illinois High School Association conferences with schools located in Kane County. The schools highlighted are located in Kane County.

Table 3-1

| IHSA Conferences Near Settler's Hill | | | | | |
|--------------------------------------|---------------------------|-------------------------------------|-----------------------------------|-----------------------|------------------------------|
| Northern Illinois Big Twelve | Fox Valley | Metro Suburban | Northeastern Athletic | Suburban Christian | Upstate Eight |
| DeKalb H.S. | Cary-Grove H.S. | Aurora Central Catholic H.S. | Alden Hebron H.S. | Aurora Christian H.S. | Bartlett H.S. |
| Kaneland H.S. | Crystal Lake Central H.S. | Chicago Christian H.S. | Christian Liberty Academy | Marmion Academy | Batavia H.S. |
| Morris Community H.S. | Crystal Lake South H.S. | Elmwood Park H.S. | Christian Life H.S. | Montini Catholic H.S. | East Aurora H.S. |
| Sycamore H.S. | Dundee-Crown H.S. | Fenton H.S. | Faith Lutheran H.S. | Rosary | Elgin H.S. |
| Yorkville H.S. | Grayslake Central H.S. | Glenbard South H.S. | Harvest Christian Academy | St. Francis | Geneva H.S. |
| Rochelle Township H.S. | Grayslake North H.S. | Guerin Preparatory H.S. | Hiawatha H.S. | | Glenbard East H.S. |
| Geneseo H.S. | Hampshire H.S. | Illiana Christian H.S. | Illinois Math and Science Academy | | Larkin H.S. |
| LaSalle-Peru H.S. | Huntley H.S. | Immaculate Conception Catholic Prep | Keith Country Day School | | Metea Valley H.S. |
| Ottawa Township H.S. | Jacobs H.S. | Ridgewood H.S. | Luther H.S. North | | Neuqua Valley H.S. |
| Sterling H.S. | McHenry East H.S. | Riverside Brookfield H.S. | Mooseheart School | | South Elgin H.S. |
| | Prairie Ridge | St. Edward Central Catholic H.S. | Westminster Christian School | | St. Charles East |
| | Woodstock H.S. | Timothy Christian School | | | St. Charles North H.S. |
| | Woodstock North H.S. | Walther Christian Academy | | | Streamwood H.S. |
| | | Wheaton Academy | | | Waubensie Valley High School |
| | | | | | West Aurora H.S. |
| | | | | | West Chicago Community H.S. |
| 10 | 13 | 14 | 11 | 5 | 16 |

Source: IHSA

There are six IHSA conferences with a total of 59 high schools, of which 23 are located in Kane County. The Upstate Eight Conference has the most schools with 16 and has 11 schools located in Kane County, which is the most of any conference. Settler's Hill has the opportunity to host sectionals for each of the five conferences in addition to the events held schools.

Schools such as Kaneland, St. Charles East, St. Charles North, West Aurora and Aurora Central Catholic host annual cross-country events at various locations throughout Kane County.

The following table shows the Kane County sites used for cross-country events.

Table 3-2

| Kane County High School Cross Country Sites | | | | |
|---|-------------|------------------------------|---|--------------------|
| Name | City | Distance From Settler's Hill | Events | Course Type |
| Aurora (Marmion Academy) | Aurora | 6 | Royal Cadet Invite | High School Campus |
| St. Charles East High School | St. Charles | 7 | IHSA Sectional | High School Campus |
| Waubonsie Valley High School | Aurora | 13 | Aurora City Meet | High School Campus |
| Kaneland High School | Maple Park | 13 | Eddington Invite, IHSA Sectional | High School Campus |
| Burlington Central High School | Hampshire | 18 | Central Invite, Rocket Invite, Genoa Kingston Matt Walter Invite | High School Campus |
| LeRoy Oakes Forest Preserve | St. Charles | 8 | Leavey Invite, St. Charles North Invite, UEC Meets, IHSA Sectionals | Forest Preserve |
| Oakhurst Forest Preserve | Aurora | 10 | Aurora Central Catholic Classic | Forest Preserve |
| Elburn Forest Preserve | Elburn | 13 | Kaneland Invite | Forest Preserve |
| Robert I Stuart Sports Complex | Aurora | 13 | West Aurora Stampede | Other |
| Lord's Park | Elgin | 15 | Elgin Cross-Country Classic, UEC Conference Meet | Park |

Source: HSP, Various Facilities

There are approximately ten sites within 15 miles of Settler's Hill used for high school cross-country events in Kane County. Of these sites, five are high school campuses, three are forest preserves, one is a sports complex and one is a park. Burlington Central High School, LeRoy Oakes Forest Preserve and Lord's Park host multiple events and are regular sites for conference and IHSA events. The cities of Aurora and St. Charles have the most cross-country course sites in the county at four and two, respectively.

Illinois Cross-Country Courses

The following table shows the cross-country courses in the state of Illinois that are sanctioned to host Illinois High School Association (IHSA) events. These are courses that have hosted a sectional or regional IHSA event.

Table 3-3

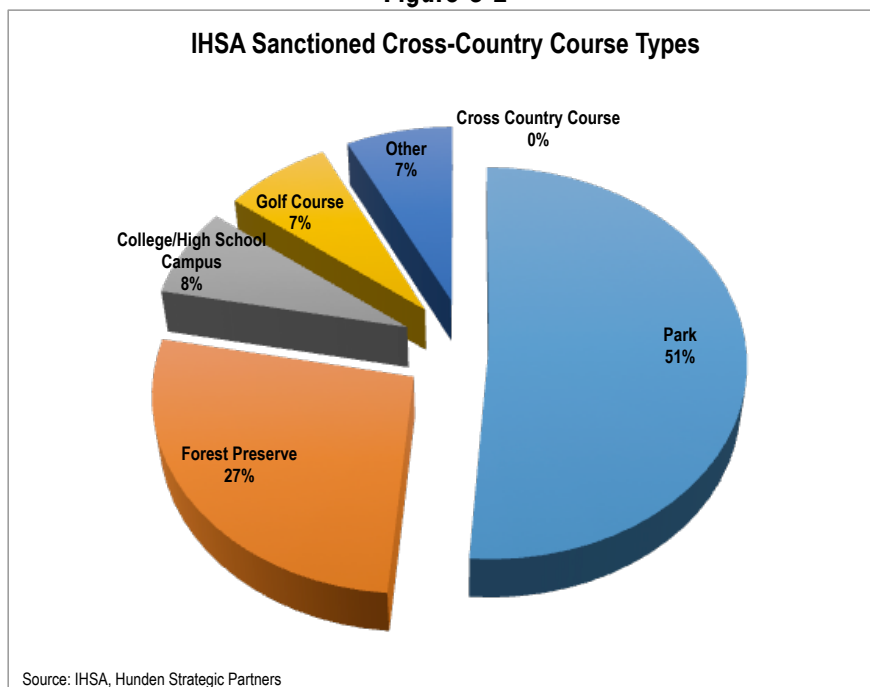
| State of Illinois Cross Country Sites | | | |
|---|-------------------|------------------------------|----------------------------|
| Name | City | Distance From Settler's Hill | Course Type |
| Aurora (Marmion Academy) | Aurora | 6 | College/High School Campus |
| Lake Park East Campus | Roselle | 20 | College/High School Campus |
| SIU Edwardsville | Edwardsville | 277 | College/High School Campus |
| St. James Farm | Warrenville | 9 | Forest Preserve |
| Oakhurst Forest Preserve | Aurora | 10 | Forest Preserve |
| Busse Woods Forest Preserve | Hoffman Estates | 25 | Forest Preserve |
| Deer Grove East Forest Preserve | Palatine | 29 | Forest Preserve |
| Sundown Meadows Forest Preserve | Riverside | 34 | Forest Preserve |
| LaBagh Woods Forest Preserve | Chicago | 42 | Forest Preserve |
| Turtle Head Lake | Orland Park | 43 | Forest Preserve |
| Harms Woods Corner of Harms & Golf Skokie | Wilmette | 50 | Forest Preserve |
| Midlothian Meadows | Markham | 51 | Forest Preserve |
| Fuller Forest Preserve | Rockford | 79 | Forest Preserve |
| Randolph Country Conservation Area | Chester | 339 | Forest Preserve |
| Newman Golf Course | Peoria | 134 | Golf Course |
| Maple Lane Country Club | Elmwood | 161 | Golf Course |
| Hickory Point Golf Course | Decatur | 178 | Golf Course |
| Montrose Harbour | Chicago | 48 | Other |
| North Creek Meadows Torrence & Glenwood | Lansing | 59 | Other |
| Mid-America Motorworks | Effingham | 231 | Other |
| Kress Creek Farms | West Chicago | 5 | Park |
| Eldridge Park | Elmhurst | 25 | Park |
| Katherine Legge Park | Hinsdale | 31 | Park |
| Melas Park | Mount Prospect | 32 | Park |
| Dellwood Park | Lockport (Twp) | 35 | Park |
| Emricson Park | Woodstock | 40 | Park |
| Channahon Community Park | Minooka | 48 | Park |
| Washington Park | Chicago | 62 | Park |
| Adler Park | Libertyville | 63 | Park |
| Oregon Park West | Oregon | 71 | Park |
| Searls Park | Rockford | 81 | Park |
| Centennial Park | Rock Falls | 84 | Park |
| Maxwell Park | Normal | 132 | Park |
| Detweiller Park | Peoria | 144 | Park |
| South Park | Quincy/Norte Dame | 145 | Park |
| Kickapoo State Park | Oakwood | 165 | Park |
| Lake Storey Park | Galesburg | 168 | Park |
| Spring Lake Park | Macomb | 215 | Park |
| Loveless Park | Carlinville | 249 | Park |
| Smithton City Park | Freeburg | 310 | Park |
| Benton City Park | Benton | 324 | Park |

Source: HSP, Various Facilities

As the map shows, the majority of the sanctioned cross-country courses are in the northeastern portion of the state, within a 60-mile radius of Settler's Hill. These courses are in line with the general population distribution across the state, as many of the larger high schools and universities are located in the Chicagoland area.

The following table shows the breakdown of course types among the ISHA sanctioned courses.

Figure 3-2



There are 41 sanctioned cross-country courses throughout the state of Illinois. More than half of the venues are parks, followed by forest preserves, school campuses, and golf courses. There are no dedicated cross-country courses used in the state of Illinois for high school events.

The following section discusses the course types used for ISHA regional and sectional events.

Parks

Parks are the most common ISHA sanctioned venues throughout the state of Illinois, accounting for 21 of the 41 courses. Many teams prefer to host events at parks due to their low costs compared to forest preserves and golf courses. In some situations, parks do not charge any rental fees or expenses to the host school. The grass at parks is also well maintained, which is a very important course feature for competition, and there are many entry points to the course for spectators. Compared to forest preserves and golf courses, parks traditionally have more loops programmed into the course design. Runners prefer to run on a course without loops, but spectators have the opportunity to watch the runners on more occasions on a park course.

Parks provide many obstacles compared to other cross-country venues. There are constantly developments and events that affect accessibility, and the physical hurdles include playgrounds, trails, and ball fields. In addition, parks are generally less aesthetically pleasing than other cross-country venues. Host teams prefer scenic, rolling venues that offer trees and natural borders. In addition, schools are responsible for providing volunteers to help run events, which can be an additional challenge for coaches and event organizers.

The following figure shows the course at Kress Creek Farms Park.

Figure 3-3



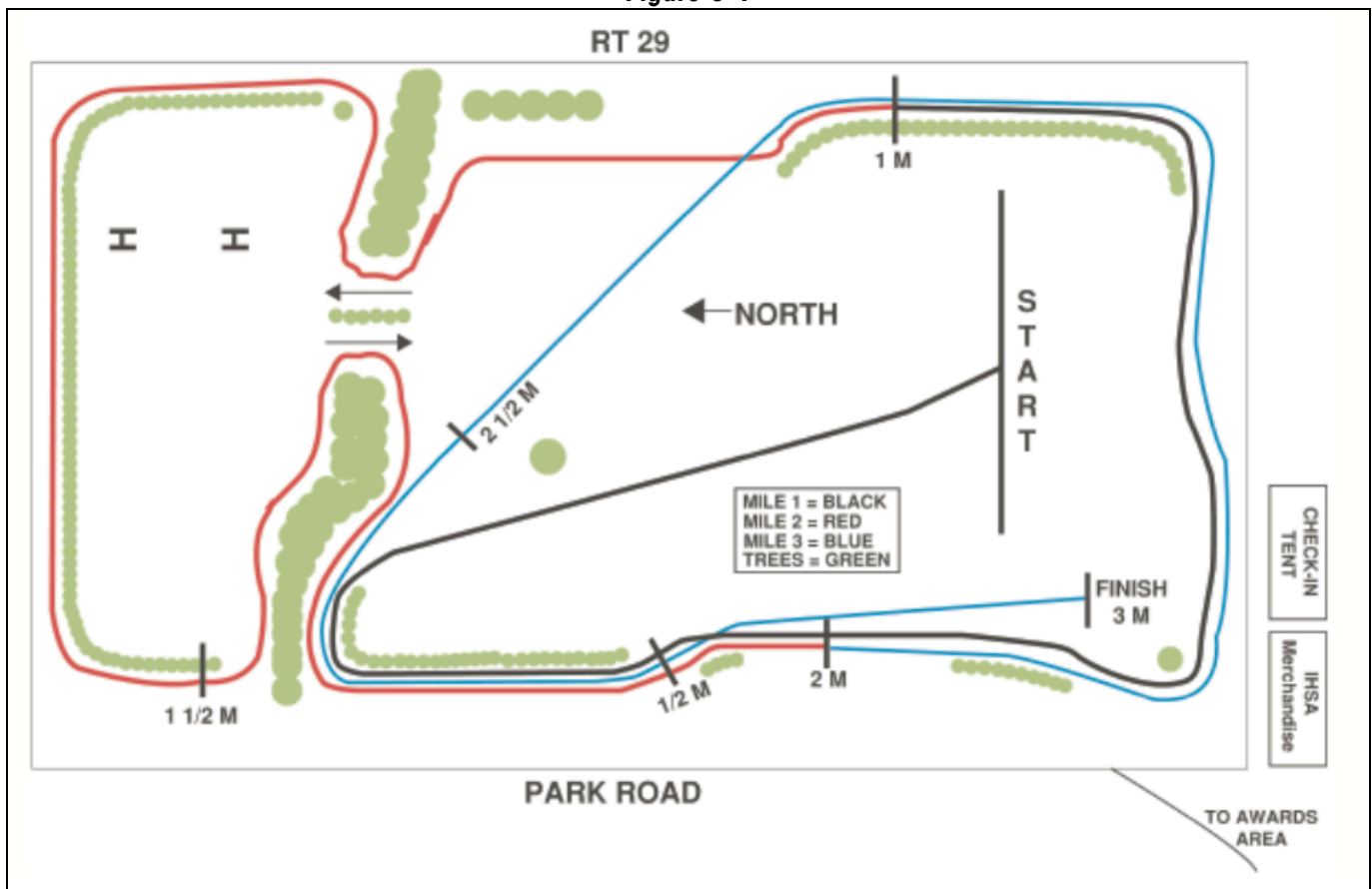
Located in West Chicago, Illinois, 4.5 miles from the potential Settler's Hill site, Kress Creek Farms is one of the popular cross-country parks in the area. Featuring 141 acres of open space, the park

hosts many West Chicago Park District events. It was the home of the 2013 Class 2A IHSA sectional hosted by Wheaton Academy, and has hosted regional events in the past as well.

Detweiller Park is located 144 miles southwest of Settler's Hill in Peoria. Detweiller Park has been the home of the IHSA state cross-country championships for the past 45 years. Held on the first Saturday in November, the state event attracts more than 1,200 athletes from 150 teams. Detweiller Park has become an iconic venue in the running community throughout the state of Illinois.

The following figure shows the three-mile Detweiller Park Cross-Country Course.

Figure 3-4



Detweiller Park has become the destination where runners and coaches want to compete in Illinois. As the state championships site and where records have been set, the park has established tradition and an aura. The layout and course setting provides open space for runners to move and quickly narrowing around corners, creating bottlenecks.

The unique feature of the course after the curve around the starting line and back down an incline along Illinois Route 29 is “the triangle.” Before the course was modified 2002, “the triangle was

more distinctive. As runners exit the triangle, they have one lap remaining. Runners must then go up an incline for the third time before reaching the finish line. Spectators at the north end of the course can see to the south end of the course and watch fans walk between the two ends cheering.

The following figure shows runners competing at the First to the Finish Invitational at Detweiller Park, one of many events held at the venue.

Figure 3-5



Forest Preserves

Forest Preserves account for 11 of the 41 IHSA sanctioned cross-country sites throughout the state of Illinois. Forest preserves are typically much more aesthetically pleasing than the park cross-country venues. There are less structures and athletic fields that a course needs to traverse through, and preserves provide many natural borders, such as ponds or lakes, that coaches and athletes prefer. Forest preserves also provide tree shade for runners, which can be very beneficial in the early fall months, and a unique rolling course with hills and valleys. Similar to a park, forest preserves provide many entry points for spectators to view the competitors.

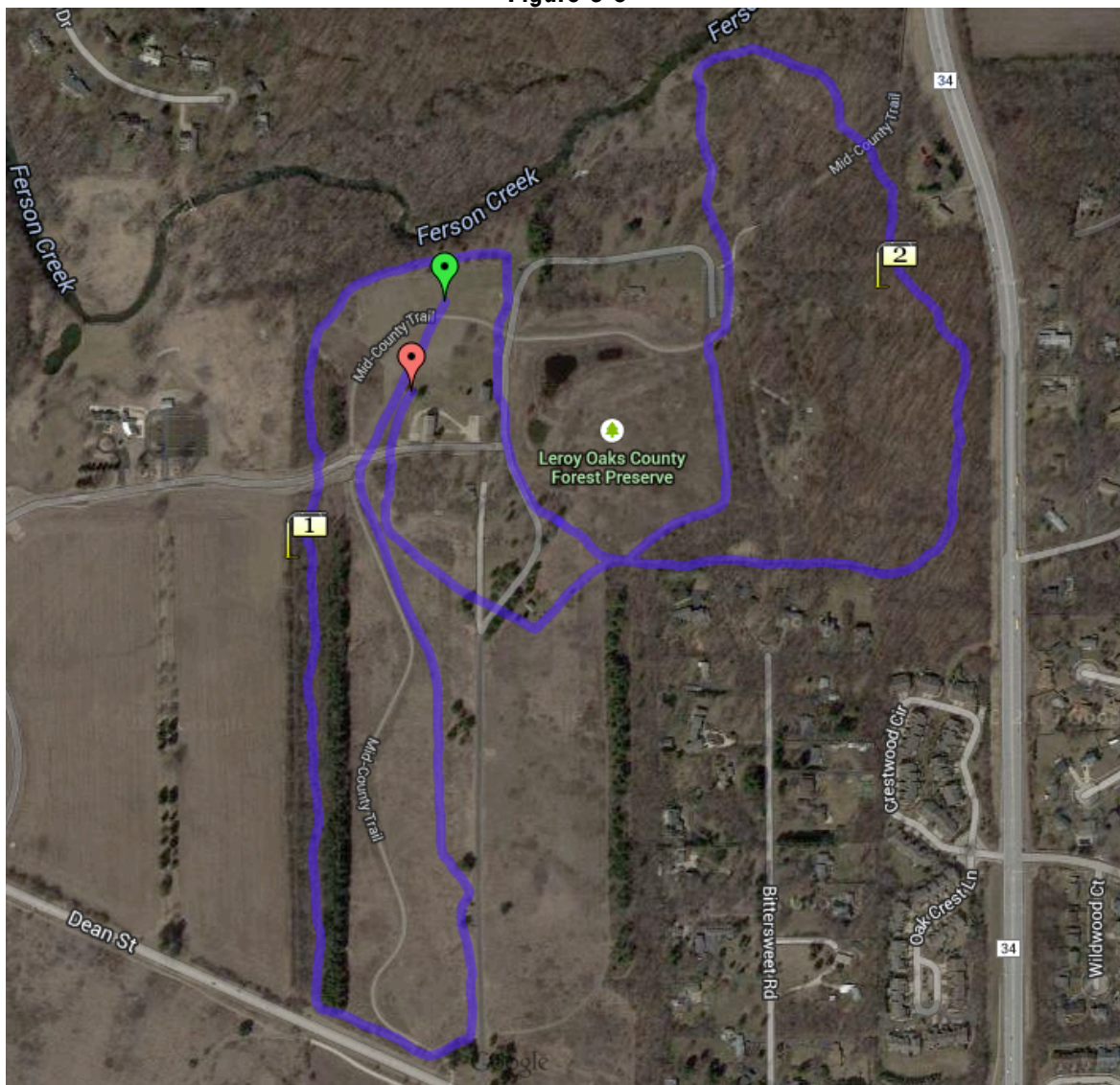
Forest preserves typically charge host teams \$200 to \$400 to host an event, which is significantly more than parks. This typically includes rangers that can assist in the set-up and organization of an event. Unlike parks, the grass of forest preserves is not consistently maintained, and many venues can have questionable footing, which is an issue for competitors. Holes or inconsistencies in the terrain can cause injuries or discomfort, and can deter coaches from holding an event at that venue. In addition, parking is generally an issue at cross-country events that take place at forest preserves. In many cases, the host team will have to prepare a separate parking area in an adjacent field and provide transportation to-and-from the course.

Located eight miles north of the proposed Settler's Hill Cross-Country Course, LeRoy Oakes Forest Preserve is one of the prominent cross-country venues in the area. It is the home course of the St.

Charles North High School cross-country team, which hosts an annual event that attracts 45 teams from around the state. LeRoy Oakes is also the home of the St. Charles East team, which hosts its annual Jeff Leavey Cross-Country Invitational at the site. In 2014, the course hosted the IHSA 3A sectional meet.

The following figure shows athletes competing at the St. Charles North Cross-Country Invitational.

Figure 3-6



It is not a course that allows optimal viewing opportunities for spectators. Spectators and coaches have stated that runners disappear at the beginning and then appear at the end. However, runners and coaches like the course because it is not overly hilly and offers a scenic for environment for runners and spectators. The course offers numerous features such as hills, trails, mud, and it is

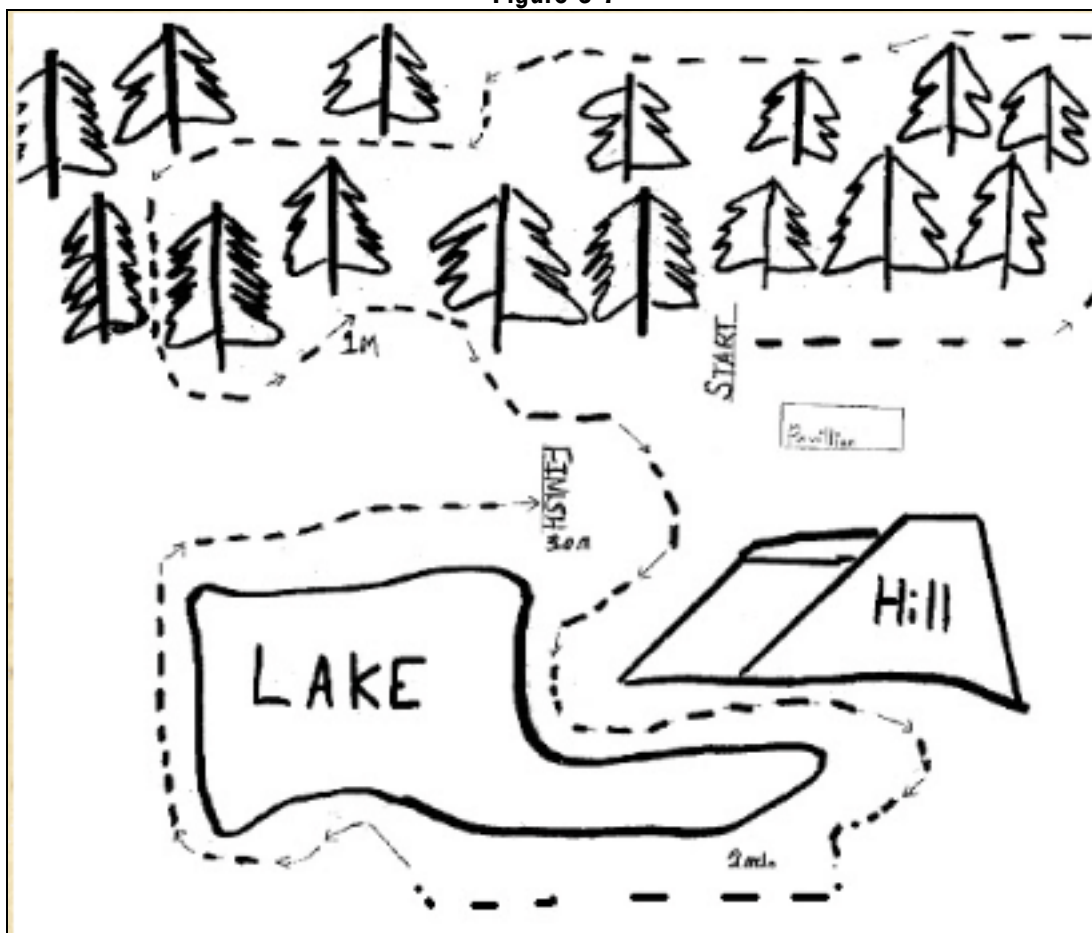
one big loop. The forest preserve has increased the financial requirements of hosting an event the site, which could deter schools and event organizers from using the site for future events.

In addition, the 612-acre St. James Farm Forest Preserve is a popular college cross-country venue in the area. Located ten miles southeast of Settler's Hill, St. James is the home cross-country course of Wheaton College, who hosts its annual invitational at the site.

Located 14 miles south of Settler's Hill, the Oakhurst Forest Preserve is a 55-acre lake and marsh complex that is the home course of Aurora Central Catholic and the Charger Classic since the course was created in 1988. Oakhurst Forest Preserve is also the site of the Aurora University Spartan Classic hosted by Aurora University. The forest preserve also hosts IHSA 2A sectional and regional events. The course is considered a fast course with a great surface on crushed limestone with an intense first 1.25 miles through the woods.

The following figure shows a sketch of the Oakhurst Forest Preserve Course.

Figure 3-7



Golf Course

Golf courses account for just three of the IHSA sanctioned cross-country courses in the state of Illinois, none of which are in the Chicagoland area. The venue provides a much different overall experience than the parks and forest preserves that competitors become accustomed to. The primary advantage of golf courses as a cross-country venue is the pristine turf. Courses are constantly maintained and mowed to provide short, manicured grass to golfers, and providing a well-maintained running surface. However, many golf courses use sand in the soil to improve course drainage. A sand-based soil can lead to soft turf, which commonly leads to injuries when the turf gives way under a runner's foot. This is one of the primary complaints and concerns when using golf courses for cross-country events.

The focus of golf courses is on the condition of the course and the golfer experience, and many clubhouses are not open to the idea of hosting these events. In the rare instances that golf courses are willing to host an event, prices will exceed those of forest preserves and parks. Golf courses want to maintain the well-manicured turf for club events, and cross-country races can potentially destroy certain areas of a course. The courses do not allow painted lines, which are common in the sport, and there are specific areas of a course that need to be avoided, such as greens and tee boxes. This proves to be another obstacle for event organizers. There are less entry points for spectators to enter a golf course, and parking is generally an issue at these events.

Golf courses are a less common cross-country course site for IHSA events due to rental costs, course restrictions and event organizer preferences.

College / High School Campus

Schools will host invitational events onsite at the school campus. These courses account for three of the 41 IHSA sanctioned cross-country courses in the state of Illinois. These events can be a result of two different circumstances; a lack of an adequate nearby forest preserve or park, or the host school's desire to cut costs and improve convenience. Hosting an event on a school campus is free, there are no travel costs, and there is diminished set-up time. In addition, parking is rarely an issue at these events due to the size of school parking lots.

While convenient for coaches and parents, cross-country events at school campuses do not provide an ideal venue for runners. The course layout must traverse through a variety of buildings and obstacles, and the turf is rarely groomed. There are few challenges, natural borders, or elevation changes in a typical school cross-country course.

Implications

The majority of the cross-country courses utilized by the IHSA to host regional, sectional and state championship events in the Chicagoland area are parks and forest preserves. Each of these venues offers a unique experience that feature advantages and disadvantages in terms of price, terrain, parking, access, and size. The IHSA sanctioned facilities do not offer a well-rounded experience for events. The majority of courses offer an environment for competition, but are unable to provide an

ideal experience for spectators. The Settler's Hill course would be the only dedicated cross-country course facility in the state.

Course Demand and Stakeholder Feedback

HSP discussed the opportunities that the Settler's Hill Cross-Country Course would bring to the market in the Kane County area. Many stakeholders, groups and organizations provided feedback and a better understanding about how Kane County could optimize the use of the course. The following provides a summary of the feedback, comments and information gathered.

The following table lists the stakeholders that HSP interviewed.

Table 3-4

| Settler's Hill Stakeholder Interviews | |
|--|--------------------------------|
| Name | Organization |
| Ryan Chapman | Aurora University |
| Jeff Bral | Bartlett High School |
| Eddie Thiebe | Big Ten Conference |
| Dan Barreiro | City of Aurora |
| Scott Buening | City of Batavia |
| Mary McKittrick | City of Geneva |
| Bob Jersey | Cross Country Skiing |
| Bob Thompson | Geneva High School |
| Jim Kafer | Geneva High School |
| Eric Ott | Geneva Running Outfitters |
| Rich Weinhandle | Judson University |
| Tim Coichon | Judson University |
| Chad Clarey | Kaneland High School |
| Peter Schauer | Lark Park High School |
| Randy Hasenbeck | Loyola University |
| Al Carius | North Central College |
| Jerry Dobbs | Palatine High School |
| Adam White | ShaZam Racing |
| Amy Egolf | St. Charles CVB |
| Mike Sommerfeld | St. Charles East High School |
| Kevin Harrington | St. Charles North |
| Jim Knoedel | University of Illinois Chicago |
| Skip Stolley | USA Track and Field |
| Chris Felinski | Wheaton Academy |
| Scott Bradley | Wheaton College |
| Source: Hunden Strategic Partners | |

Ryan Chapman is the head men and women's cross-country coach and the head men and women's track and field coach of the Aurora University Spartans. He took over as head coach in

2008 and has been named as the Northern Athletics Collegiate Conference Coach of the year 15 times.

- Settler's Hill is 20 minutes from the Aurora University campus. The cross-country teams' home course is seven miles away at the Oakhurst Forest Preserve. The programs' home course can vary year-to-year based on what sites are available.
- The sport of cross-country is growing and there are few quality courses in the area to support local athletes.
- If the project is completed, Aurora University will host an event at Settler's Hill.
- The annual AU Spartan Classic attracts more than 500 junior college athletes from around the country.
- The NACC Conference Championships could potentially be held at Settler's Hill. This includes 11 teams and approximately 250 competitors.
- The NACC Conference Championships are on rotation and would not be held at Settler's Hill on an annual basis. The majority of the conference teams are in Wisconsin, so the championships are held in Wisconsin most years.

Eddie Thiebe is the Assistant Director of Championships at the Big Ten Conference. He evaluates the bids for Big Ten Championship events and runs and organizes the events. He is assigned several non-revenue generating sports, including cross-country. Eddie stated:

- Every Big Ten school has a cross-country team and hosts meets.
- Every sport's championship has a different method of determining the location. For cross-country, the championships are rotated to each team by alphabetical order.
- Northwestern University will host the 2015 Big Ten Cross-Country Championships.
- Universities have the right to pass on its opportunity to host, and the decision would go to the next school in line.
- It is doubtful that the Big Ten coaches would agree on a permanent site.

Scott Buening is the Community Development Director for the City of Batavia. He coordinates and reviews development within the city and also provides technical support to elected officials. Scott stated:

- The City of Batavia has no significant objections to the development.
- The City has no direct involvement with that area of the county and will not in the foreseeable future.
- There are no hotel rooms within the Batavia's city limits.
- Batavia is interested in the project, but would need to review more specifics before they could take an official position on the Settler's Hill Cross-Country Course.

Mary McKittrick is the City Administrator for the City of Geneva. Mary supervises all department heads and prepares the annual budget for the City Council's approval. Mary stated:

- She would like to see the property annexed into the city of Geneva. Currently, only a portion of the golf course clubhouse is part of the city for liquor license purposes.
- Geneva cannot provide electricity unless the area is within the city limits.
- The Geneva Public Safety Department will be involved in emergency and fire control occurrences at Settler's Hill.
- The fire department currently supports Fifth Third Bank Ballpark.
- Ideally, the development of a Metra Station near Settler's Hill would improve the access and attractiveness of the site.
- The City is currently utilizing several hundred acres east of Kale Road for industrial use.
- The City is comfortable with the shopping and dining options but wants to improve the entertainment and lodging options.
- The City is very supportive of the project and believes it could be beneficial to the area, but would like to be more involved in the strategic planning.

Bob Jersey is a cross-country ski racer and coach. He has raced in and organized cross-country skiing events in the Chicago area for more than 40 years. Bob Stated

- There is a small, tight-knit cross-country ski community in Chicago.
- A multipurpose venue would be great but grooming and daily maintenance would be essential.
- Could potentially be a great venue for recreational skiers when it snows.
- The site is not ideal for ski races. The snow in Northern Illinois is not consistent enough to hold races; events are primarily held in Wisconsin, Minnesota and Northern Michigan.
- Wind is a huge factor as it can blow snow off the course, which makes grooming essential.
- Roller skiing would be a better option than cross-country skiing. This would be dependent on the terrain and/or roads developed on Settler's Hill.
- Cross-country ski events typically attract 100 competitors, though some of the larger races can bring 200 to 300.
- An ideal course would be one-third downhill, one-third flat, and one-third uphill. A 3.5-mile loop is the standard length.
- The course would not be a big revenue generator for the facility or county.

Jim Kafer is the Athletic Director at Geneva High School and Bob Thompson is the head coach cross-country coach at Geneva High School. Jim and Bob stated:

- It is becoming more and more difficult to find cross-country venues in the area.
- The weekly invitational events are utilizing the forest preserves and the demand is increasing.
- Many of the courses are undergoing renovations and must accommodate public use, making them less conducive for cross-country events.
- Geneva does not currently host an annual event, but will occasionally host the conference championship.
- The open setting of Settler's Hill is a concern due to the lack of cover for spectators. It can be very hot during the cross-country season and tree cover is important to athletes and spectators.
- Another concern is the parking costs. Currently, the only meet that charges for parking is the state championship meet at Detweiller Park.
- Total cost to run an event will be the most important factor when considering using Settler's Hill.
- If the course is going to stay in superior condition, it cannot host 45 events per year.
- Schools in the area will likely run the Settler's Hill course less than three times per season because coaches and teams prefer to vary the site and terrain.
- Many teams have committed schedules for the next few years. Additionally, it is very difficult to create a new event and attract teams.
- Ideally, a designated course would require less set up costs and time due to permanent concessions, bathrooms, and course marshals. Also, onsite timing equipment would provide a turnkey operation so groups do not have to contract another vendor.
- Settler's Hill would be well received if it were similar to the Terre Haute course.
- Geneva High School would potentially consider hosting an event at Settler's Hill. Administration believes it would be a great site for sectionals and regionals.

Eric Ott is the owner of Geneva Running Outfitters, a sporting and running goods store in Geneva. Eric is heavily involved in the running community in the area. Eric stated:

- Anything that benefits the citizens and businesses of a community is supported.
- He wasn't initially supportive of the idea when it included biking.
- Chicago would be a big draw in the running community. The area is very accessible by flying or driving.
- The condition of the course is an important factor. It's not like a baseball or football stadium, the course needs to be consistently maintained.

- The course should reach out to timing companies and athletic representatives for non-school events.
- There might be 30 cross-country specific courses in the entire nation.
- He could see himself hosting a two-race summer cross-country tour in the summer. A smaller event in June and a larger event in July, hopefully attracting a couple hundred competitors to each event.

Rich Weinhandle is the former cross-country and track and field head coach at Judson University. Rich began his career has a Hall of Fame collegiate athlete before earning a high school coaching job and eventually moving up to the collegiate level. Overall, Rich has been involved with the sport of cross-country for 46 years. Rich stated:

- The proposed location is very intriguing. A cross-country-specific course is very unique and the landfill could provide unique opportunities.
- It's important that a course is centrally located between lodging, dining and entertainment.
- Experience in organizing, marketing and managing cross-country events is critical for whoever is managing the facility.
- The NAIA is always willing to entertain bids to host events. However, the conference must see a benefit to the host site.
- The venue could potentially host conference championship events.
- Rich would not be actively involved in organizing the effort to attract the NAIA National Championships.

Tim Ciochon is the Judson University head men and women's cross-country coach. Tim had previously been the assistant coach of the track and field team. Tim stated:

- There are few good cross-country courses in the Kane County area.
- If this course existed, there is no doubt that it would be able to attract events at all competition levels.
- Judson currently hosts one event per year at Wing Park in Elgin, Illinois.
- The CCAC Conference Championships attract approximately 270 competitors. Teams can bid to be the host school, and then the championship is determined upon rotation.
- The previous Judson head coach, Rich Weinhandle, had spearheaded an effort to host the NAIA National Championships, but was not successful in securing the event.
- The NAIA is considering a permanent host site. Currently, it is on rotation and is held in the Midwest every three years.
- Judson University would consider hosting an event at Settler's Hill, but would not pursue the NAIA National Championships.

Chad Clarey is the boy's head cross-country coach at Kaneland High School. Chad stated:

- A dedicated cross-country course would be great for the area, but there are concerns.
- It is difficult to find schools willing to host sectional and regional IHSA events.
- Kaneland hosts its annual Eddington Invitational at the Elburn Forest Preserve, which is a hilly and shaded venue that isn't big enough and lacks parking.
- Due to size restrictions, Kaneland hosts sectional events on the Kaneland High School campus.
- There is concern about the setting at Settler's Hill. There are currently very few trees, which could be problematic on a hot day.
- Some teams may not want to compete on Settler's Hill because its terrain isn't comparable to Detweiller Park where the state championships are held.
- A new course will absolutely have growing pains and may not be attractive early in its existence.
- The lining of the course is very important and the ease of setup is a critical factor.
- Kaneland would consider hosting an event at the course.

Randy Hasenbeck is the head coach of the Loyola University men's and women's cross-country teams. Randy stated:

- The team could not train on the course. NCAA rules require the team to travel no more than ten miles from the campus for practice.
- He could potentially host races but the distance from campus would create problems logistically in transporting the equipment and volunteers.
- Part of the draw would be the city of Chicago, but the further from the city the site is, the less attractive a site will seem. Kane County is not close enough to the city for it to be a primary draw.
- Loyola previously held races on the Lakeshore path, but the area became too congested. They currently do not have a home course.
- It's very important that the NCAA rulebook is consulted in the development of the course.
- Overall, the course presents opportunities for Loyola, but challenges as well.

Al Carius is North Central College's head cross-country coach and associate head track and field coach. In addition to a 48-year coaching career at North Central, he also won five individual Big Ten championships at Illinois. He was recently selected for induction to the Chicagoland Sports Hall of Fame. Al stated:

- A championship cross-country course in Kane County is a fantastic idea.

- Many teams in the area currently hosting meets at forest preserves, which are becoming increasingly more expensive to rent and do not provide sufficient event parking.
- North Central College does not currently have a home course. The cross-country program pays \$100 to \$200 entry fees for each event it competes in.
- St. James Farm Forest Preserve in Warrenville is one of the primary courses in the area. The site provides sufficient parking and has a scenic, rolling course.
- A dedicated cross-country course would have a positive impact on the sport throughout the entire Chicagoland area.
- North Central College would consider Settler's Hill as a potential conference championship site, but it would likely not host an invitational due to the hassle and effort involved in hosting events.

Adam White is the founder of ShaZam Racing, an event management, timing, and scoring solution company. ShaZam Racing is the primary timing company for cross-country events throughout the state of Illinois. Adam stated:

- In addition to acting as a timing company, ShaZam Racing also owns and operates nine different events throughout the region, which include marathons, 5Ks and fun runs such as the Blarney Blitz and Screaming Pumpkin in Peoria.
- ShaZam Racing also hosts one evening cross-country event that attracts approximately 1,500 competitors of all ages.
- ShaZam Racing would be interested in potentially hosting an event at Settler's Hill.
- The course should reach out to college level 8K events as well as junior high invitationals. It is a growing sport at the junior high level.

Amy Egolf is the Executive Director of the St. Charles Convention and Visitor's Bureau. Amy stated:

- The idea of a cross-country course in Kane County is terrific.
- A few years ago they identified cross-country as a potential attraction to the area. They reached out to the NAIA with the goal of hosting its national championships. The NAIA would not commit due to a lack of a venue.
- The CVB needed the support of the local colleges in order to attract the NAIA National Championships. Rich Weinhandle of Judson University spearheaded the effort to attract the national championships.
- There are three CVB's in the Fox Valley area: Elgin, Aurora and St. Charles. Geneva does not have a CVB.
- St. Charles is the home to 53 percent of the hotel rooms in the Fox Valley.
- St. Charles utilizes a unique online housing service for accommodations. For any big event in the area, there is a dedicated website on the registration page that has real

time reservation information. St. Charles can evaluate hotel room inventory and outsource the excess inventory to surrounding cities.

- There would be a direct sales initiative with the Settler's Hill Cross-Country Course. The CVB travels to two national sports trade shows and Settler's Hill will be a part of the sports and entertainment package marketed.

Kevin Harrington is the head boys and girls cross-country and track and field coach at St. Charles North High School. Kevin stated:

- There is definitely a great opportunity for a designated cross-country course in Kane County, but there are concerns as well.
- St. Charles North is currently hosting one large invitational per year at LeRoy Oakes Forest Preserve, a venue that they are very happy with.
- The boys and girls event attracts 45 teams and several thousand people from around the region. All spectators park outside the campus, and approximately 45 buses transport the spectators to the course. They also bring in 15 to 20 port-o-lets for each event.
- The total cost to host the annual invitational is approximately \$4,000 to \$5,000. This includes port-o-lets, facility staff, park police, fire department and the timing company.
- The event generates approximately \$2,000 to \$3,000 in revenue from T-shirt and concession sales.
- The program also utilizes LeRoy Oakes for conference, sectional, and regional events. Typical events last three hours, with the three boys races and three girls' races taking place every half hour.
- Concessions, bathrooms, and parking will be important factors to the success of Settler's Hill.
- The overall ease of use and costs would determine St. Charles North's interest in utilizing the Settler's Hill cross-country course. The cross-country program is very happy with its current situation with LeRoy Oakes.

Jim Knoedel is in his 15th season as the University of Illinois Chicago's men's and women's cross-country and track and field coach. Jim stated:

- A championship level cross-country course is a great idea.
- It is becoming more difficult to deal with park districts because costs continue to increase.
- The Chicago Park District rental fees can reach \$1,500. Team entry fees are approximately \$250. UIC is responsible for providing flags, barricades, and other equipment.
- There is a definite possibility of hosting the Horizon League Conference Championships

- UIC would potentially be interested in hosting an event to kick off the season at Settler's Hill.

Skip Stolley is the National Team Development Coordinator for USA Track and Field. Skip is the Executive Director of the Illinois Elite Christian Track Club and the Chairman of the Chicago Area Track and Field Organizing Committee. Skip stated:

- High School coaches and athletic directors in the area are supportive of the project.
- The venue will have to team with schools in order to host championship events.
- The NCAA is looking for permanent sites for championships, they recently selected the University of Oregon as the new host of the NCAA Track and Field Championships
- Conference Championships are on a rotational basis, could host Big Ten, NAIA and Division III events.
- Settler's Hill is attractive due to the parking availability and the course design, which allows two-thirds of the course to be visible.
- If the course exists, teams will use it and area high schools are likely to have weekly events throughout the fall.
- The off-season could consist of cross-country skiing, 5K events and 10K events.
- Between the months of August and November, the course would be utilized every weekend.

Chris Felinski is the head coach of the Wheaton Academy boys and girls cross-country team. Chris stated:

- He is not quite sure how much of a need there is for this type of facility
- There aren't many hosted meets between the schools in the area, and the majority of the teams that do host events, host one per year
- Cross-country schedules are determined years in advance, and its very difficult to break commitments and create new events
- Wheaton Academy has hosted two events per year, including sectional and regional events, at Kress Creek Farms, which is part of the West Chicago Park District. They open, hill course has two 1.5 mile loops
- Wheaton Academy budgets approximately \$1,000 to host an event. This includes expenses for the facility rental, timing company, and officials. It is the host teams responsibility to provide flags and race equipment
- Teams are charged 150 dollars as an entry fee
- Wheaton Academy is very happy with their current situation at Kress Creek Farms, and would not be looking to host an event at Settler's Hill

Scott Bradley is in his 13th season as the head coach of the men and women's cross-country team and his 15th year as the head coach of the men and women's track program at Wheaton College. Scott Stated:

- It would be awesome for the sport of cross-country to have a dedicated course in Kane County
- Wheaton College's current home course is St. James Farm Forest Preserve. It is a great course, but limited in some aspects. Wheaton College would not be interested in finding a new home course.
- The Wheaton College cross-country program hosts one invitational, Wheaton "Gil Dodds" Invitational, per year.
- The cost to host the Wheaton "Gil Dodds" Invitational is approximately \$1,500. This includes approximately \$300 for mowing and maintaining the course, \$500 for transporting port-o-lets, \$200 for setting up a pavilion and concession stand, and \$500 for a timing company.
- High schools in the area are constantly looking for home courses to host events.
- Parking is a vital component to any potential cross-country course. High school meets typically need more parking than college meets due to family attendance.
- 5K and 10K events should be considered as well.
- Wheaton College would not leave St. James to host a home meet at Settler's Hill, but they could envision this course as a regional host venue.

High School Athletic Directors

HSP interviewed area high school athletic directors that are currently hosting cross-country invitationals as well as sectionals and regional meets. The interviews helped to understand the cost, challenges and logistics of operating a high school cross-country meet whether onsite at the school or at an offsite location such as a forest preserve or park. Additionally, the athletic directors shared their level of interest in relocating existing or hosting new events at the Settler's Hill Cross-Country Course based on the proposed layout and assumed amenities.

- The high school events range from 30 boys and girls teams up to 60 boys and girls teams. Total participants range from 600 to more than 2,000 participants.
- Some events are limited in size due to lack of parking, course/site layout and the venue itself. Many schools must bus runners and spectators from remote parking location.
- IHSA regional and sectional meets are smaller than regular-season meets.
- Events typically run from 9am to 1pm.
- Most events have between two and three spectators for every participant.
- Most common expenses for events include: venue rental, buses/parking, portable bathrooms, timing equipment, awards and support staff/services.

- Average event costs between \$4,000 and \$7,000.
- Athletic Directors responded positively to renting a venue where all costs are inclusive in the rental agreement.
- A \$5 parking/admission fee does not seem to be a major issue. The state championship cross-country meet charges a \$10 parking/admission fee.
- Athletic Directors didn't have an issue with the venue managing/controlling concessions. However, it is recommended that a percentage of concession revenue be shared with the host school because booster programs use concessions as a fundraiser.
- Lack of parking is one of the primary challenges schools have when hosting a cross-country meet. Most schools must rent buses and shuttle visitors to and from venue.
- The Settler's Hill course may have difficulties attracting teams in the initial years because coaches prefer to compete at courses their schools have a history with in order to compare times and performance.
- Interest in the Settler's Hill Cross-Country Course was mixed. Some Athletic Directors would not use the facility because they host their event on school grounds or are committed to their existing site. Athletic Directors facing site rental cost increases and logistical challenges valued the ability to bundle most event costs at the Settler's Hill Cross-Country Course.

Implications

Cross-country stakeholders in the area are enthusiastic about a potential dedicated cross-country course on Settler's Hill, but there are concerns. Cost is the primary factor that influences coaches decisions to host events, and parks are currently charging very little to rent out their venue. In addition, many coaches have scheduled events years in advance, and starting a new event takes time and effort that many schools are not willing to commit. The physical layout of the course provided some hesitations as well. Temperatures can be in the 80s during early season events, making sufficient tree cover for athletes and other covered spectator areas is very important. A few coaches also mentioned that their goals are to prepare for the state championship at Detweiller Park, and the terrain of this venue is vastly different.

Coaches expressed interest because a designated course in Kane County would provide an athlete and fan experience that is currently unavailable in the market. A well-groomed terrain, sufficient parking, and easy event set-up are attractive features to coaches and event organizers.

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RELEVANT CROSS-COUNTRY COURSE ANALYSIS

This chapter will identify and profile selected comparable and competitive cross-country courses, and the corresponding regional and national tournaments to better understand those facilities. These cross-country courses, located in the Midwest and throughout the U.S., host meets at the national and regional level, while also hosting local user groups and events. These facilities are likely to continue to compete with a new Kane County facility on national levels of participation, however, not as much on a local level. The analysis will also look at Kane County's position in relation to these facilities to identify the opportunities within the region's competitive market.

The following table shows an overview of relevant cross-country courses in the region and some nationally significant courses. HSP has identified and will discuss profiles of each, particularly some of the most competitive and significant.

Table 4-1

| National Comparable/Competitive Cross Country Courses | | | | |
|---|--------------|-------|----------------------|----------------|
| Name | City | State | Course Type | Hosts National |
| Lavern Gibson Championship CC Course | Terre Haute | IN | Cross Country Course | ✓ |
| Mt. SAC Cross Country Course | Walnut | CA | Cross Country Course | ✓ |
| Rim Rock Farm | Lawrence | KS | Cross Country Course | |
| UW-Parkside: Parkside Cross Country Course | Kenosha | WI | Cross Country Course | |
| UW-Madison: Zimmer Championship Course | Verona | WI | Cross Country Course | |
| Balboa Park | San Diego | CA | Park | |
| Franklin Park | Boston | MA | Park | |
| Holmdel Park | Holmdel | NJ | Park | |
| Van Cortlandt Park | Bronx | NY | Park | ✓ |
| Belmont Plateau | Philadelphia | PA | Park | |

Source: HSP, Various Facilities

Lavern Gibson Championship Cross Country Course

Lavern Gibson Championship Cross-Country Course lies just outside the eastern edge of Terre Haute, Indiana off Highway 42 near Interstate 70, near the city's Hulman Field Airport. Terre Haute is a small-to-medium sized market that has highway access via the east-west Interstate 70 and north-south U.S. 41, but no significant commercial airport service or railroad service. The nearest major airport is 60 miles east on I-70 at Indianapolis. It is the home to Indiana State University with approximately 12,000 students located in downtown Terre Haute.

The site of the course was originally a strip mine in the 1950's and 1960's until it was converted into a private landfill. After the landfill closed in the 1980's the area sat idle for ten years, and in the mid 1990's the owner of the property began the process of redeveloping the area into a cross-country course. Indiana State University, along with donated money from Larry Bird and Lavern Gibson's donated land, took 245 acres behind the Wabash Valley Family Sports Center, an indoor

athletic facility, in 1997 and opened the Lavern Gibson Cross Country Course. The course, initially, cost \$1 million to develop.

The following figure shows the site before and after reclamation.

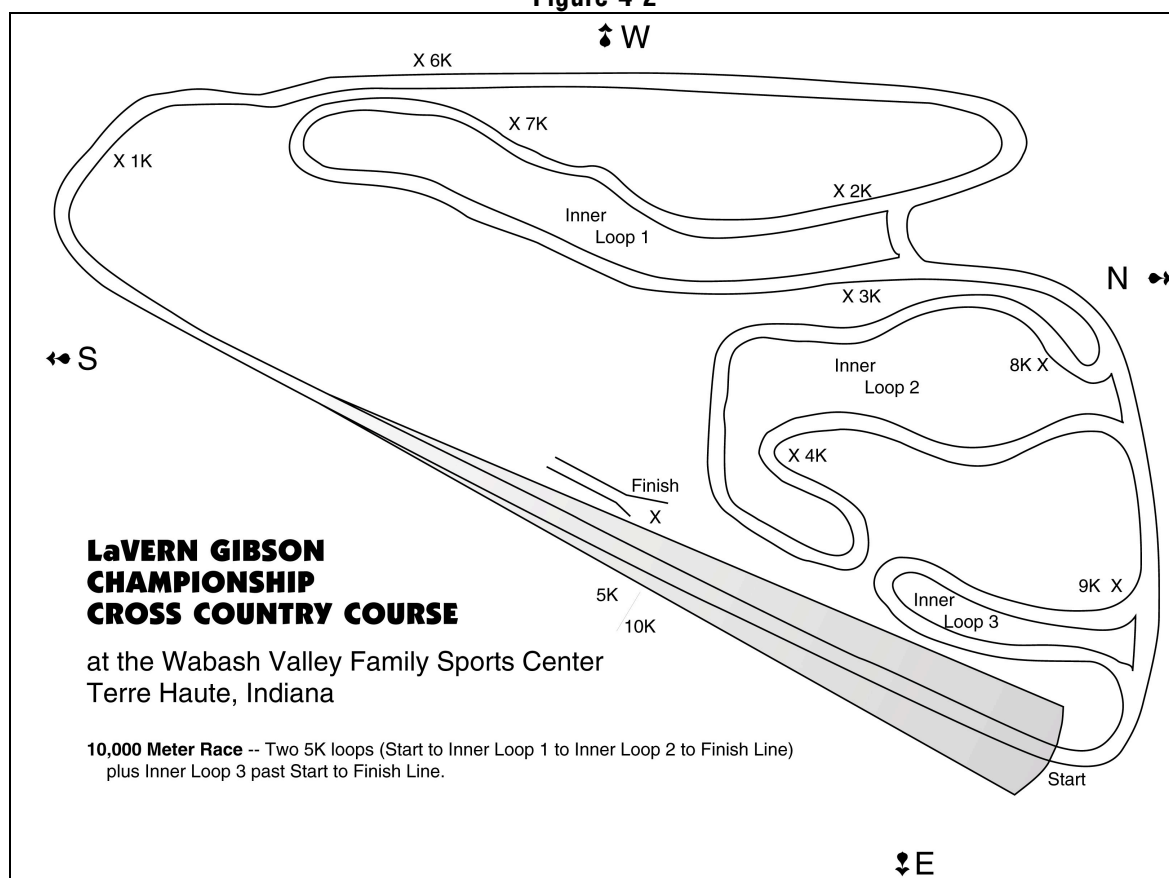
Figure 4-1



Over time, with improved facilities, it became a spectators' favorite cross-country venue, substantially changing the way people see and interact with the events. The arrangement of the multiple loops (these can be closed off or opened to create virtually any length of course), the attractive rolling terrain, start/finishing straight, press box, restrooms and concession stands, and viewing areas greatly improve the viewer experience. The start and finish line lies upon a hill from which fans can view the entire course and keep an eye on individuals with the help of binoculars. Many fans prefer to move from section to section to see a favorite contender several times during a complete circuit, and this course allows for that. This course was the first to use a video board showing the real-time order of lead runners. The public address system can be heard throughout the course as well, making an event at Lavern Gibson feel more like a major college athletic event like basketball, football, volleyball or baseball. The entire complex is wide open for a spectator who is standing still to witness the entire event.

The following figure shows the 10K race layout.

Figure 4-2



Lavern Gibson is considered a premier cross-country course in the United States and is operated by Indiana State University. Many of the major events hosted in Terre Haute are:

- Eleven of twelve NCAA Division I Championships from 2003 to 2014
- The requisite Pre-National Invitational event for each Division I championship race
- NCAA Division III championships
- NCAA regional championships
- NXN (Nike Cross Nationals high school invitational)
- Regional championships
- The Indiana High School State Championships

The fall calendar includes about ten major events from late August to the NCAA Division I Championship just before Thanksgiving. There are enough events that play out here that the city has dubbed itself “Cross Country Town USA”. In a major shift for the sport, the popularity of the NCAA Division I Championship at Lavern Gibson with spectators lead to the NCAA Cross-Country

Championship to be held on Saturdays instead of Mondays, going head-to-head with college football.

The following table summarizes Lavern Gibson's historical events.

Table 4-2

| Lavern Gibson Championship Cross-Country Course | | | | | | | | | | |
|--|------|------|------|------|------|------|------|------|------|------|
| Event | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
| Bill Welch Indoor Track & Field Classic | | | | | ✓ | | | | | |
| Bloomington North Early Bird Invitational | | | | | | | ✓ | | ✓ | ✓ |
| Cross Country Coaches National Youth Championships | | | | | | | | ✓ | | |
| IHSAA State Championships | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Indiana Intercollegiates | | | | | | | | ✓ | | |
| Indiana State Cross Country Meet | | | | | | | ✓ | ✓ | | |
| Indiana State Invitational | | | | | | | | | ✓ | |
| Indiana State Preview Meet | | | | | | ✓ | | | | |
| ISU Open Track & Field Meet | | | | | | | | | ✓ | |
| NCAA DI Cross Country Championships | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | | ✓ | ✓ |
| NCAA DIII Cross Country Championships | | | | | | | | ✓ | | |
| NCAA Pre-Nationals | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | | ✓ | ✓ |
| Nike Cross Nationals Midwest Regional | | | | | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Pacesetter Invitational | ✓ | ✓ | | | | ✓ | ✓ | ✓ | | |
| Sycamore Invitational | | | | ✓ | ✓ | ✓ | ✓ | | ✓ | ✓ |
| Terre Haute Indoor Open | | | | | | | | ✓ | ✓ | |
| Terre Haute North Sectional | | | | | | | ✓ | | | |
| Terre Haute Savings Bank Invitational | | | | | | | | | ✓ | ✓ |
| Terre Haute State Preview | | | | ✓ | | ✓ | ✓ | | ✓ | |
| Total | 4 | 4 | 3 | 5 | 6 | 8 | 10 | 8 | 11 | 7 |
| Source: MileSplit, Lavern Gibson CC, HSP | | | | | | | | | | |

Source: MileSplit, Lavern Gibson CC, HSP

The Lavern Gibson Championship Cross-Country Course hosted seven events in 2014. These include two high school invitations, a state sectional championship, and the Indiana State Championship at the high school level, in addition to a Nike regional event, and two events related to the NCAA Division-I National Championship.

Management of the Lavern Gibson Championship Cross-Country Course indicated that the facility hosts approximately eight to ten events per year from the months of August through November. The course charges a rental fee from \$2,000 to \$6,000 for larger regional and national events, though they charge significantly less for high school and college meets. The course requires approximately \$40,000 to \$50,000 per year in maintenance cost, which is supplemented by the Convention and Visitors Bureau. Tax revenues generated from the local bed tax are also used to offset the remaining operating deficit.

Management stated that the course could host more events, but in order to keep the course in top performance conditions and maintain its reputation as an elite cross-country destination, the course is used for specific events and is not available for general public use. Lavern Gibson is operated by a local team of 25 to 30 volunteers that serve duties ranging from medical to course set-up to social media. Management of Lavern Gibson stated that a dedicated team of volunteers is vital to the success of any event.

The course underwent a \$100,000 improvement in 2014 and a second \$100,000 improvement is planned in 2015. Improvements will address landfill settlement, installation of permanent bathrooms near start line, an award stand, and a new finish line.

Zimmer Championship Course at University of Wisconsin-Madison

The Zimmer Championship Course in Verona, Wisconsin is situated adjacent to the University Ridge Golf Course in the far western suburban lands of Madison, Wisconsin. The course opened in the fall of 2009. Madison is the primary city in a large and growing metropolitan area that, as of 2012, has 806,884 people. Madison is the capital of Wisconsin, and home to the University of Wisconsin's flagship campus, which has an enrollment of more than 43,000 students. Access to Madison is served by the Dane County Regional Airport, which offers 94 daily departures and arrivals and services 1.5 million annual passengers. Larger airports in Milwaukee and Chicago are within a two-hour drive. Interstates I-39, 90, and 94, combined with the U.S. 151 expressway, offer easy highway access from across the upper Midwest.

The NCAA Division I championship may be held annually in Terre Haute, Indiana, but the Thomas Zimmer Championship Cross-Country Course is expected to host that event in the near future. The University of Wisconsin Cross-Country team is one of the country's premiere teams, and until 2009, had no home course. The athletic department at UW-Madison, and the cross-country coach Jim Stintzi in particular, began organizing a series of meetings and a plan to construct the next spectator-and-television camera-ready cross-country course. The course was designed and built with a budget of \$250,000 to \$300,000, and has similar loops in the same design as the Lavern Gibson Cross-Country Course in Indiana. The course has two brief sections where the trail enters into a wooded area, and was designed specifically for spectator viewing and, especially, broadcast television. In 2010, the Big Ten Cross Country Championship was televised in this course's first year. Additionally, the 2012 and 2013 Great Lakes Regional Meets were held at Zimmer Championship Course. Drawbacks to this course are a lack of parking for spectators and no electricity. Parking is at Blackhawk Church in Middleton approximately five miles away. Shuttles are used to transport runners and spectators.

The following figures show the layout of the 4K-course map and aerial view.

Figure 4-3



Figure 4-4



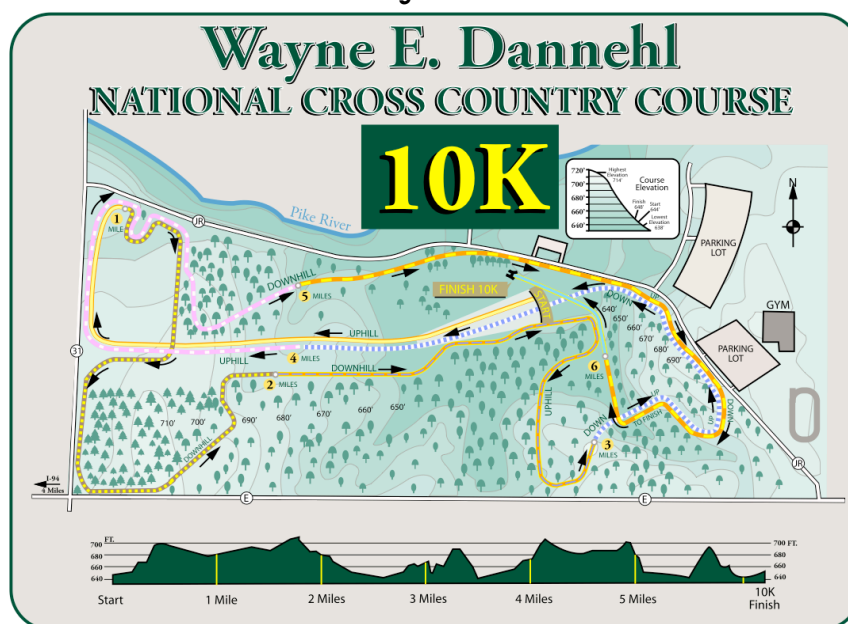
The course itself has an inner loop of 1,000 meters and an outer loop of 2,500 meters. The course can also hold 4K, 5K, 6K, 8K, and 10K races, and features a wide start/finish area to host very large events of hundreds of runners. The course is run through a hills and valley area surrounded by fully-grown trees and woods and presents a colorful display during October races. Spectator areas are mostly on a high ground berm above the course, between the starting and finishing line, so that nearly the entire course can be seen from the viewing grounds. Several trails and cutouts weave through the course so that spectators can travel around to watch their favorite runners in many places along the course. The maximum elevation difference between lowest and highest point along the course is 90 feet. The course is fully irrigated and therefore retains a lush green color through the competitive season. The course hosts an annual Wisconsin Adidas Invitational with 36 university teams competing in both men's and women's races.

Parkside Cross-Country Course at University of Wisconsin-Parkside

The Parkside Cross Country-Course is located at the UW-Parkside campus located near Lake Michigan between Kenosha and Racine, Wisconsin. The university is home to 4,700 students, and resides on the border between the Chicago and Milwaukee metropolitan areas. There two metro areas contain approximately 12 million people combined, the largest population center between the Atlantic and Pacific coast cities. Access from both Milwaukee and Chicago is easy via Interstate 94. Air travel to Chicago's two major airports, O'Hare and Midway, plus the nearby convenience of Milwaukee's General Mitchell Airport combine for excellent access from any airport in the world. Train travel between Milwaukee and Chicago runs seven daily round-trips nearby and has a stop at Sturtevant just six miles north-northwest of the course.

The following illustration shows the 10K map of the course.

Figure 4-5



The following figure shows athletes competing on the Parkside Cross-Country course.

Figure 4-6



The Wayne E. Dannehl National Cross-Country Course is a heavily wooded course that features challenging hills, although there are open spaces as well for spectators to view. It has hosted every Foot Locker Midwest regional ever held, as well as 27 NAIA Championships, including 22 straight from 1981 to 2002. This course is a well-known course within the world of cross-country, however its greatest asset is also its most challenging dilemma. The mature trees make running more attractive, but block the view from a spectator standpoint. Television broadcasting would be nearly impossible.

Franklin Park Cross-Country Course

Boston's Franklin Park is home to a historic cross-country course. Franklin Park lies south of downtown Boston and is near the Dudley Square Silver Line of the "T". Boston has world-class transportation access. Logan International Airport is the nation's 19th busiest airport with between 29 million and 33 million passengers annually. Every major airline in North America serves this airport and connects directly to all of their first or secondary hubs. It is also a major destination for many European airlines, and even many pacific routes such as Japan Airlines, El Al, Cathay Pacific, and Aeromexico. Interstate highway 90 is the longest Interstate in America, and begins its westward journey from Downtown Boston, eventually connecting to Seattle. Greater Boston also is connected to the rest of New England and the rest of North America by I-84, I-89, I-93 and I-95. As America's oldest major city, and the home of both MIT and Harvard, numerous historic U.S. presidents, the local attractions are too numerous to list. Attractions in the area run the gamut from historical sites and neighborhoods to Fenway Park, home of baseball's Red Sox, to museums, ocean ships, and getaways like Martha's Vineyard, Nantucket, and Cape Cod.

Franklin Park is Boston's oldest park, part of the "Emerald Necklace" of interconnected parks designed by Frederick Law Olmstead, who also designed New York's Central Park. The City of

Boston Parks and Recreation Department runs the courses and the adjacent 72-acre Franklin Park Zoo, the largest zoo in Boston.

Franklin Park is Boston's largest park. The cross-country races began as early as 1914, just as the park was completing finishing touches of its construction. Over the century, it has been a popular course for major regional events such as:

- The NCAA Northeast Regional Championships (alternates every other year with Cortlandt Park in Bronx, NY)
- The USATF Northeast Championships
- The popular Mayors' Cup races
- Numerous other college and high school races such as the Massachusetts All-States Meet
- USA Championships (four times)

Two races of enormous caliber set this park apart. In 1984, the city hosted the USA Cross-Country Championship for the first time since 1950. The event went so well that local organizers began clearing the way to lobby for the IAAF Cross-Country Championship in 1992, only the second time it has ever been held in the Western Hemisphere. Approximately \$350,000 was spent creating a world-class course which included cutting new paths through the woods, cutting up the pavement of roads where the new start/finish run would be placed, and replacing them with grass and crushed stone. The race ended inside White Stadium where thousands of spectators could cheer the final lap.

The following two figures show the 8K-course map and runner making their way up the steep Bear Cage Hill.

Figure 4-7

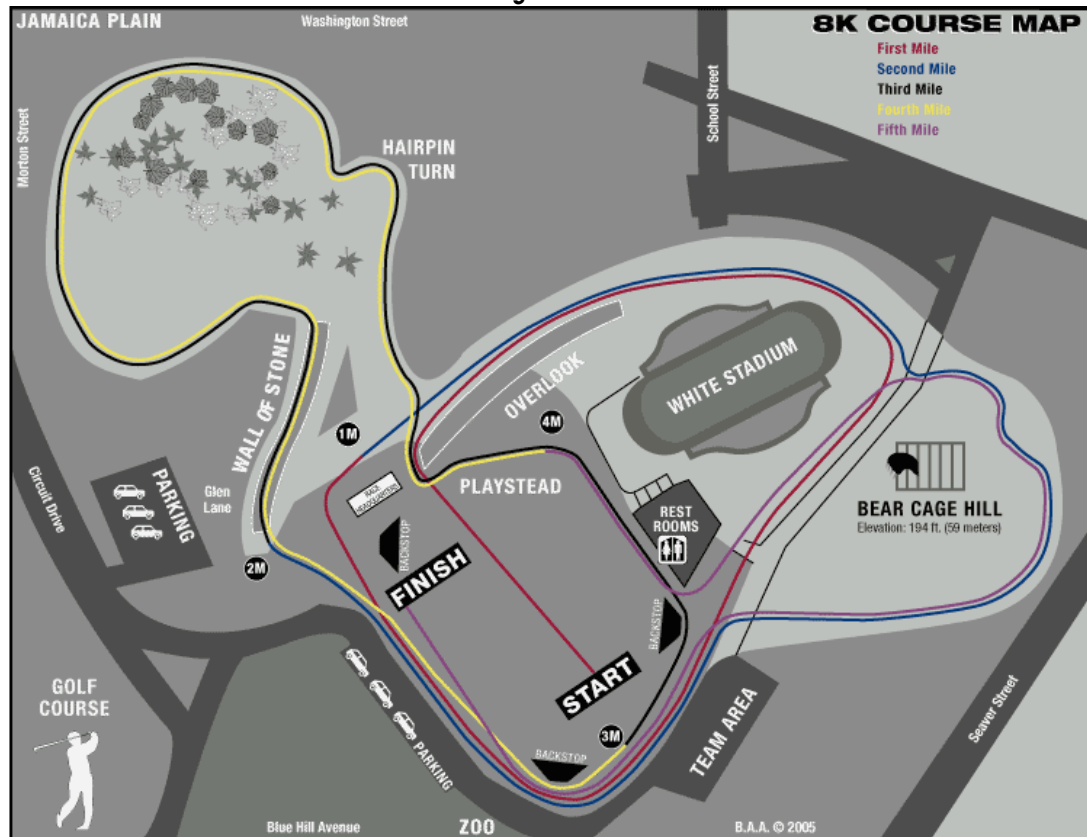


Figure 4-8



The park includes courses for 3K, 5K, 6K, 8K, and 10K meters. The course is basically three loops that can be combined to form varying lengths of race. They are the Stadium Loop, which follows around the park's White Stadium; the Bear Cage Hill Loop, which goes up a moderate hill where the Franklin Park Zoo formerly housed its bears; and the Wilderness Loop, which strays into a wooded area before coming back into the open parkland. During the autumn, races are held generally every Saturday and some Sundays, however many area residents are putting up some resistance against the constant noise and crowds of the events.

Mount SAC Cross-Country Course

The Mount SAC Invitational dates back to 1948 and is considered the classic west-coast cross-country course. Located 25 miles east of downtown Los Angeles, the course is between the city and the area known as the inland empire. The Los Angeles area is a mecca for tourism, with an endless array of attractions, particularly those along the Hollywood Hills such as the various TV and movie studios, shopping and large entertainment districts. Farther away in Santa Clarita is Six Flags Magic Mountain, and Orange County is home to Disneyland, Knott's Berry Farm, Angels Stadium and the famous beach towns Laguna Beach and Newport Beach. Los Angeles International Airport, LA/Ontario International Airport and the John Wayne Airport are all major airports that connect the region with every hub airport and Pacific destination, in addition to many other international destinations. Southern California is rather isolated from the rest of the United States via automobile highway because of the great distances between L.A. and most of America's other cities. Nevertheless, L.A. is connected by Interstates 5, 10, 15, and 40, plus California Highway 99 and U.S. 101, both major highways running north and south through the state.

The cross-country course is run by San Antonio College and follows around the desert hills near Hilmer Lodge Stadium across the street from the main campus of Mount San Antonio College. The course is considered one of the toughest courses anywhere and has several loops, and each has its distinct characteristics. They carry names such as Switchbacks, Valley Loop, Reservoir Hill, and Poop Out Hill. The runners start on a long airstrip and run over three hills. The Valley Loop is a flat loop in the beginning of the race where runners usually overtake others. After a relatively flat run through the Valley Loop, four steep, uphill tight-knit hairpin turns called The Switchbacks are very technical as the runners are often closely packed entering this area. The surface can be dusty, with sand and pebbles, which makes running difficult, however recent years have seen improvements made on the course. Arguably the most challenging is the infamous "Poop Out Hill," which is the steepest hill on the course. The final long uphill run that runners come to face is Reservoir Hill. Finally, a steep descent curves into the flat finish area to the start/finish field in front of spectators to create a fast, exciting final run.

The following figures illustrate the course map and hills, and also a photo of runners negotiating hills and the Switchback section.

Figure 4-9



Figure 4-10



Mt. SAC gets use by junior college teams, and little to none by open runners, but by far its heaviest use is by high school runners. The massive Mt. SAC Invitational might be the nation's largest cross-country meet, with 23,000 runners from more than 600 schools in 129 races. The best of these runners come back in November for the CIF's Southern Section championships, and the best of those come back in December for the Foot Locker Cross Country Championships west regional.

Van Cortlandt Park

New York is one of the three most accessible cities in North America, due to its various train networks, three major airports, and network of freeways in and out of the city. Its list of attractions rivals that of any world-class city. Any event that takes place in New York, NY, is afforded more clout simply because it is in New York City. Van Cortlandt Park is at the 242nd Street subway stop on Broadway, and also the Woodlawn station, and regular users of the city subways and elevated trains use it to arrive for meets.

First opened in 1913, the park's cross-country course is in heavy use throughout the fall by high schools and colleges and other competitors. Because of this, it is possible, or even likely, that more people have run a cross-country race at Van Cortlandt Park than at any other venue in the U.S. or even the world. The park is legendary, due to the number of events over such a long period of time, and it even warrants its own Hall of Fame. In 2012, it celebrated its 100th year of cross-country racing. The park dates back to 1888 and is the fourth largest park in New York City, and is even larger than Central Park. It is a mecca for high school meets, and other races, including:

- The Manhattan College Invitational is the park's signature event. It attracts 10,000 athletes from 300 schools in 13 states, including the west coast. It is the largest one-day cross-country meet in the nation. In order for it to syphon all the runners through, each race starts every 12 minutes, while other races are still ongoing. Forty races include the Eastern States Championship.
- NCAA Northeast Regional Championship (alternates with Boston's Franklin Park every other year)
- The IC4A (Intercollegiate Association of Amateur Athletes of America)
- NCAA Championships in 1968 and 1969.
- The U.S. Nationals
- The Van Cortlandt Track Club, 600 members strong, began here in 1971.
- New York Road Runners sponsors a cross-country series in this city park every fall. Events range from 5 kilometers to 15 kilometers (3.1 miles to 9.3 miles).

This is an old, historic course. Among the challenges of such a well-used park include occasionally being inhabited by other users that are non-cross-country related. Horses from nearby paths sometimes stray onto the cross-country running course, although this is less of a problem now than in the 1970s and 1980s. The course trails that run through the open fields may be compromised by rugby, cricket and soccer play. However, in 2008, a refurbishment of the trails commenced, resulting in greener trails for a faster run and a cleaner-looking terrain.

The following figures show the course map and the running terrain.

Figure 4-11

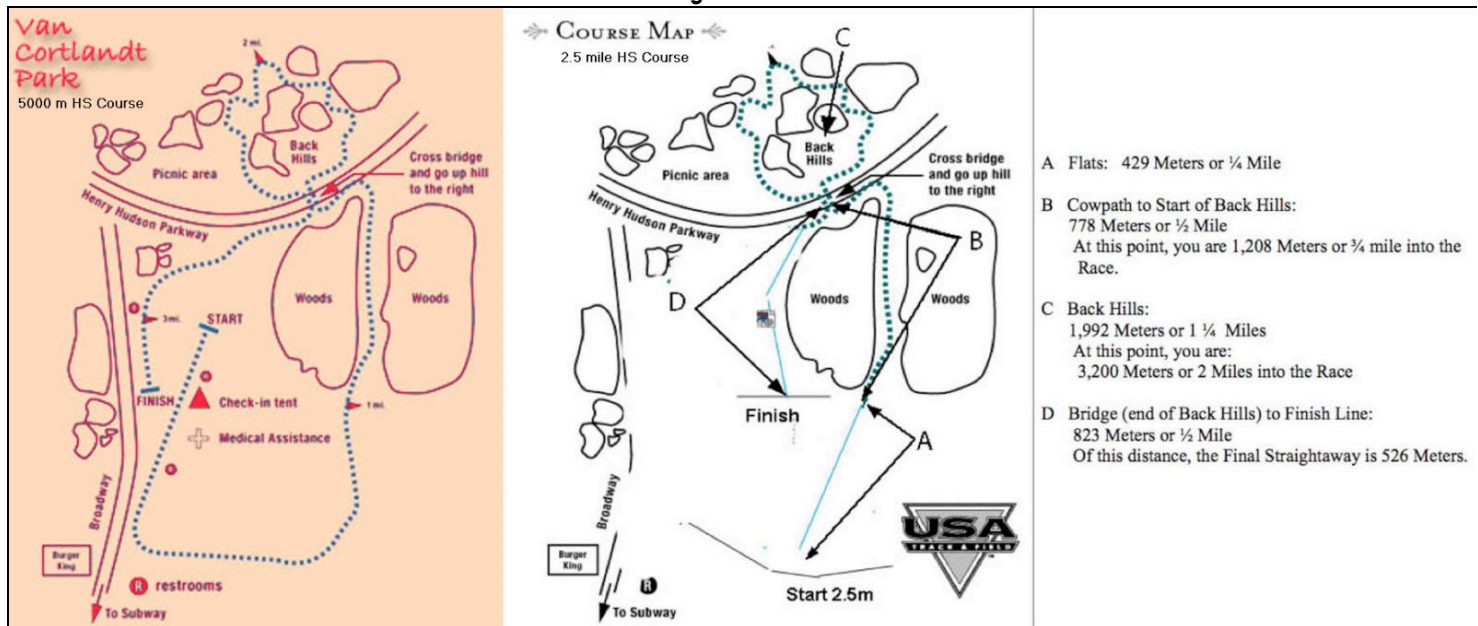


Figure 4-12



The course itself has various features that work its way through the hilly and wooded terrain. Some of these sections include areas known as the “flats”, a dusty cow path, Freshman Hill, a bridge over the Henry Hudson Parkway, the back hills, and Roller Derby Turn. The park is owned by the

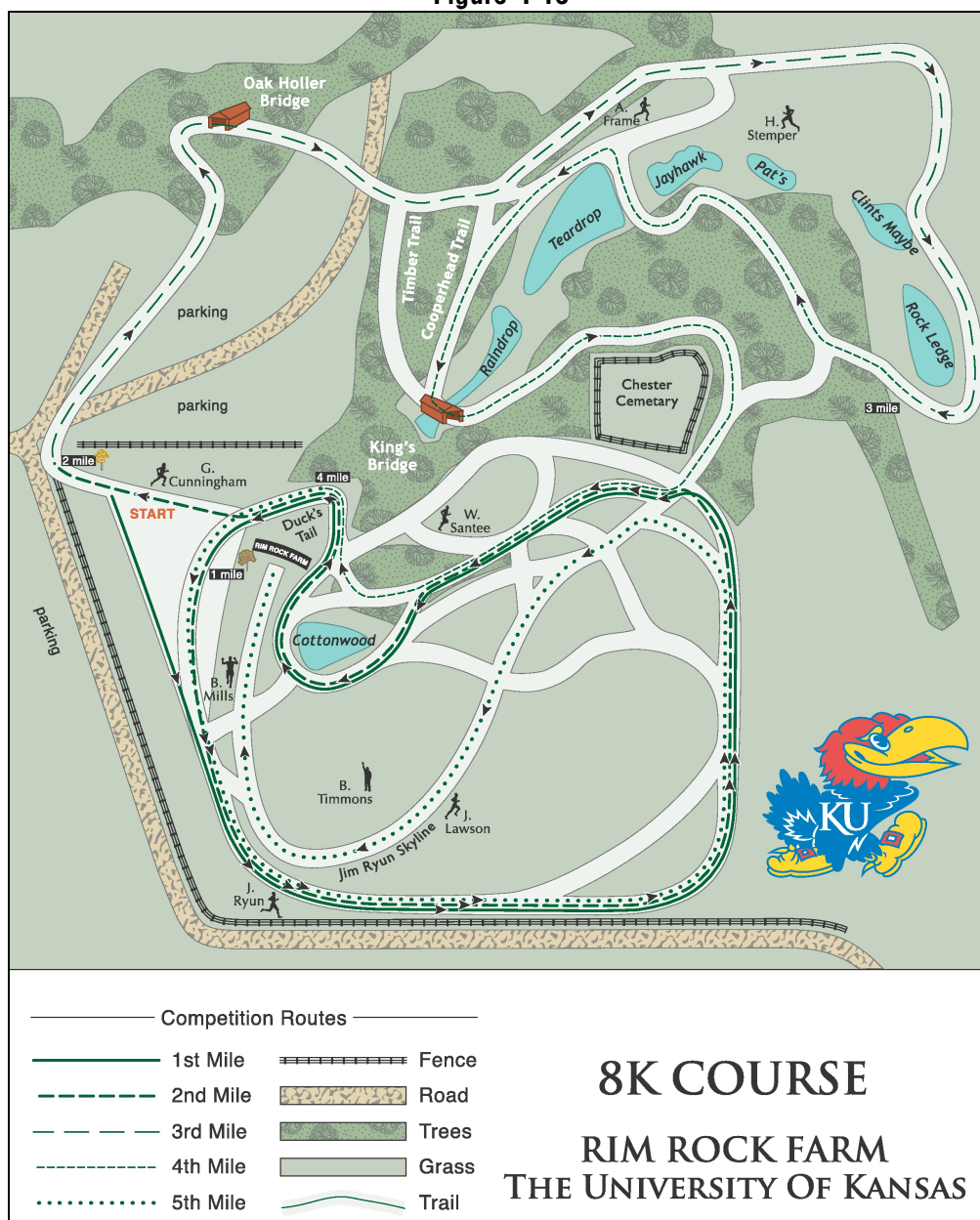
NYC Department of Parks and Recreation, and maintained by the Van Cortlandt Park Conservancy, organized in 2009.

Rim Rock Farm

Lawrence, Kansas, is the home of the University of Kansas' cross-country course called Rim Rock Farm. The course features hills and varied elevations, two covered bridges through which runners traverse, and four points of the course from which spectators can observe their favorite runners. Before being donated to KU in 2004, the property was owned by former head track and field and cross-country coach Bob Timmons and has been the home of the Jayhawks since the 1974 season. Dispersed throughout the course are silhouette statues of seven legendary Jayhawk distance runners. In the fall of 2006 and 2014, Rim Rock Farm played host to its first Big 12 Cross-Country Conference Championships. Rim Rock Farm hosted the Big Eight Cross-Country Championships in 1983, 1991 and 1995 and was also the site of the 1998 NCAA Division I and II Cross-Country Championships as well as numerous Kansas high school state meets.

The following figure shows the Rim Rock Farm course.

Figure 4-13



The following figure shows runners competing at Rim Rock Farm.

Figure 4-14



Balboa Park

Balboa Park near Downtown San Diego is a historic landmark, being one of America's oldest city parks, dating back to 1835. It's home to the famous San Diego Zoo and numerous museums. The portion of the park that contains the cross-country course is called Morley Field. Collegians or professional runners do not use the course often, however, it is well known as the home of the Foot Locker Cross-Country Championships for 28 of the past 35 years, as well as many other high school meets and championships such as the CIF San Diego Section Finals and the Aztec Cross Country Invitational. From 1979 through 1992, the Kinney Cross-Country Championships were held at Balboa Park. At least 46 major meets have been held in the park since 1979. The course is a 1.5-mile loop run twice for a 5K race. One half of the course is flat while the other half is run through hilly parkland, offering a variety of challenges and views for spectators.

The following figure shows the course layout for the Foot Locker Cross Country Championships.

Figure 4-15

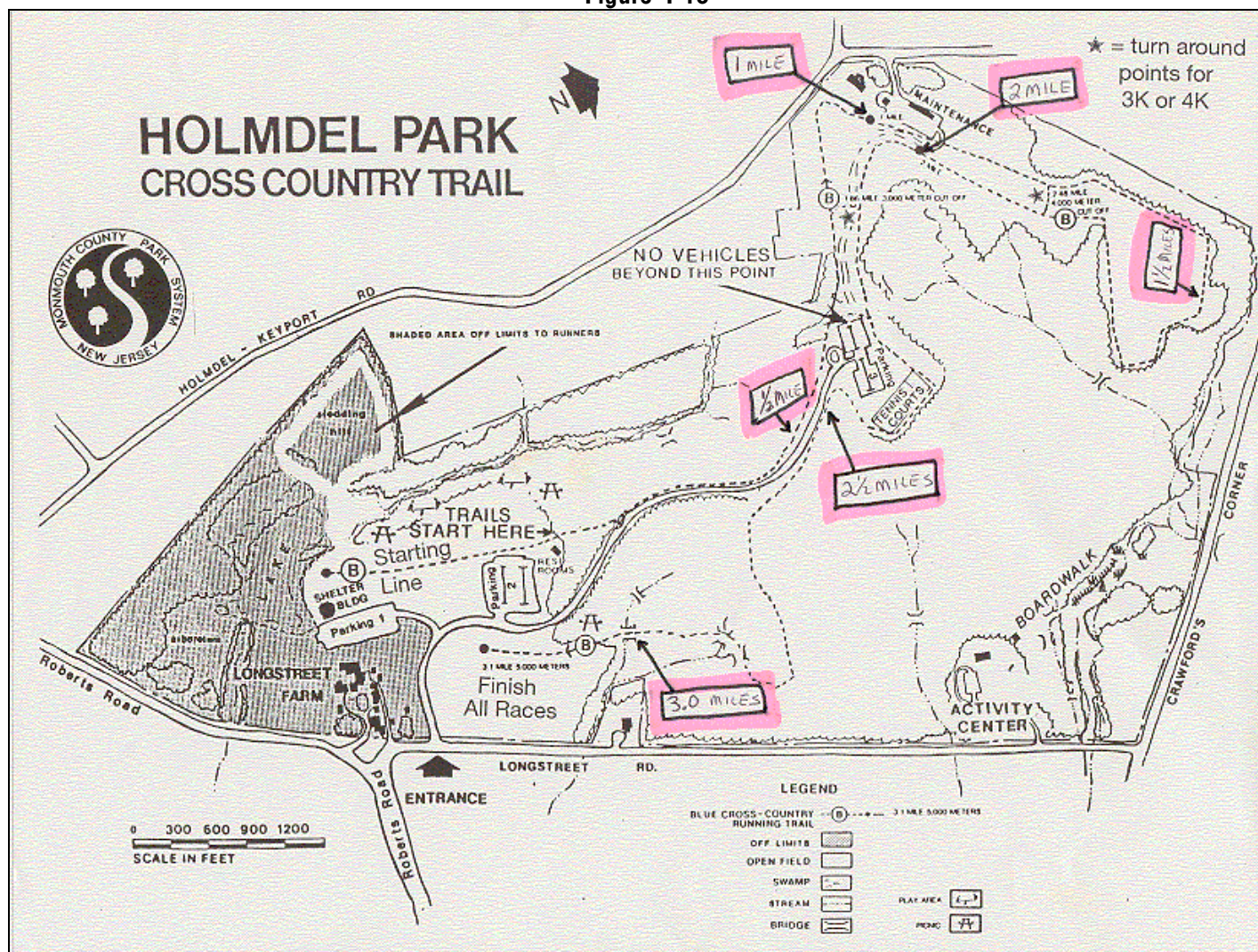


Holmdel Park

Holmdel Park is located in central New Jersey across Raritan Bay and due south of Staten Island, NY. Low but rugged and forested hills create a diverse and challenging course for high school meets. Since 1997, more than 80 meets have taken place at the site, including the Monmouth Invitational, Adidas Shore Coaches XC Invitational, USATF NJ Cross Country Championships, and New Jersey State Championships. The course is a single loop that traverses many portions of the large park, including two long sections of completely forested trail. The elevation difference from highest to lowest point is 192 feet.

The following figure shows the layout of Holmdel Park.

Figure 4-16



Belmont Plateau

Belmont resides in Fairmont Park in Philadelphia, PA, and is a single, five-kilometer wooded loop of unpaved trail. Many NCAA champions and Olympians have competed on the Belmont Plateau course. Besides the Franklin Park in Boston and Van Cortland Park in Bronx, NY, Belmont Plateau remains one of the most historic cross-country sites in the country. There are 2K, 3K, 4K, 5K, 6K, & 8K courses officially mapped out by USATF Mid-Atlantic Association. The elevation difference throughout the course is 174 feet, and the course runs around a baseball field plain, while the rest of it runs through forested hills. Sections such as Parachute Hill, a 200-foot descent, and Surekill Hill. More than 100 meets for high school and college teams have occurred here since 2001, including the PCL Meets, Philadelphia Catholic League, Atlantic 10 XC Championship in 2012, USATF Mid Atlantic Association Junior Olympics Championship, Central Atlantic Collegiate

Conference Championships, The Philly Metro Meet, as well as many high school championships for the state and for eastern Pennsylvania, and the Quad X High School Invitational, sponsored by Nike. The National AAU Championships were held here in 1976. The park is run by Fairmount Park, the municipal park district of Philadelphia, which is overseen by the Philadelphia Department of Parks and Recreation.

The following figure shows the Belmont Plateau course layout.

Figure 4-17



Implications

A new championship-level cross-country course at Settler's Hill will be competing with several very high quality courses in the region and across the country. The University of Wisconsin has prepared for the latest generation of cross-country course, which includes large-scale amenities for spectators and television and media broadcasting. To the south in Terre Haute, Indiana State University is home to the current sport leading competitive course. Even closer to Kane County, UW-Parkside has a legendary course, although not as formidable competition as it once was due to newer advancements in spectator-friendly cross-country events. For this reason, it will be critical

for a new cross-country course to market itself to local and regional user groups, event organizers and especially, high school and college teams in the area.

While subtle and considerable differences are found between the profiled facilities, each course's business model is focused on scheduling large tournaments, and as many as possible, with multiple teams and hundreds of runners. According to the U.S. Track and Field Cross Country Coaches Association (USTFCCA), team entry fees are generally \$110 per membership team and \$160 per non-membership team and USTFCCA events.

From a facility standpoint, a new Kane County venue must offer amenities that include concessions, restrooms, and merchandise/concessions area for spectators, all of high quality. Other expected amenities include a scoreboard for the top runners and their times, along with a public address system that brings to mind the feel of a major sporting event that can create a buzz within the community and draw larger crowds, and more teams to the tournaments. As for the course itself, it is becoming more necessary to provide a groomed, grassy running course with hills and valleys, curves and straightaways, with various vistas if possible, and easily accessible points for crowds to witness the race. It is preferable to create a visually interesting course with a smooth grass surface for television camera-outfitted vehicles to be able to drive on the course ahead of runners.

Most of the profiled courses do not provide parking. Settlers Hill could rise to near the top of the cross-country community simply for providing ample parking close to the starting and finishing line. The visitor experience is a strategic and very important element to the success of these facilities. Indiana State University made the spectator experience a first priority and is reaping the benefits across the city, with full hotels and restaurants during race weekends. Kane County can follow a similar strategic plan and still be one of the nation's first and outstanding examples of this new breed of cross-country course. The Chicagoland area is ripe for a development of this kind due to its strong high school athletics programs and being the third largest population center in North America after New York and Los Angeles. Additionally, the Kane County area offers abundant accommodations, restaurants and shopping within a few miles of Settler's Hill for visitors to enjoy during off-running times.

The success of a new cross-country course at Settler's Hill will depend on how well the facility's management can meet the standards set by these comparable facilities as well as market a high quality and unique opportunity for users. For a community to be competitive in the sports tourism industry, an innovative and immaculate course alone will not suffice. Clearly, a destination package must include quality onsite amenities as well as a suitable hospitality package.

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CHAMPIONSHIP AND HIGH PROFILE EVENT OPPORTUNITY ANALYSIS

National and regional cross-country events will play a vital role in the economic and fiscal impact that the Settler's Hill Cross-Country Course will have on Kane County. These events generate significant visitation, spending, room nights and other impacts to the community. These events tend to attract non-local participants and their families that require overnight accommodation, unlike those visitors within a 100-mile radius who tend to make daytrips.

HSP analyzed the current cross-country event market to better understand the landscape of national and regional cross-country events, as well as determine the likelihood of these events being held at Settler's Hill.

USA Track and Field

USA Track and Field (USATF) is the national governing body for the sport of track and field, cross-country, road running, and race-walking. It is a non-profit organization with a membership of nearly 100,000 members. The organization is involved in many aspects of the sport at the local, national, and international level, rules, officials, coaching, education, Master competition, and the National Track and Field Hall of Fame.

USA Track and Field hosts four annual national cross-country championships. The USA Cross-Country Championships, first held in 1890, includes six races: masters women (6K), masters men (6K), junior women (6K), junior men (8K), open women (8K), and open men (12K). In addition to crowning champions, the championships serve as the trials race to select the Team USA squad for the IAAF World Cross-Country Championships. The USA Masters 5-km Cross-Country Championships, first held in 2002, include a men's race and a women's race. The USATF National Club Cross-Country Championships feature the top clubs from across the United States, and the USATF National Junior Olympic Cross-Country Championships has races for boys and girls in five different age divisions.

The following table summarizes the sites of the USA Cross-Country National Championships from 2006 through 2015.

Table 5-1

| USA Cross-Country National Championships | | |
|---|--------------------------------|-------------------|
| Year | Site | Location |
| 2015 | Flatirons Golf Course | Boulder, CO |
| 2014 | Flatirons Golf Course | Boulder, CO |
| 2013 | Forest Park | St. Louis, MO |
| 2012 | Forest Park | St. Louis, MO |
| 2011 | Mission Bay Park | San Diego, CA |
| 2010 | Plantes Ferry Recreation Park | Spokane, WA |
| 2009 | Agricultural History Farm Park | Derwood, MD |
| 2008 | Mission Bay Park | San Diego, CA |
| 2007 | Flatirons Golf Course | Boulder, CO |
| 2006 | Van Cortlandt Park | New York City, NY |

Source: USATF

In order to be eligible as a host venue for the USA Cross-Country National Championships, a course must complete a bid application process. The championship is then awarded at the USA Track and Field annual meeting. The bid applications requests that the bidder include information such as:

- **Local Organizing Committee Details:** Detailed information concerning the host organization's major athletic competitions or other events.
- **Housing and Meals:** A bidder must ensure that adequate hotel rooms or other housing are available to accommodate athletes, coaches, officials and family members. They must also ensure that adequate eating establishments will be available at the championships.
- **Travel, Transportation, and Parking:** The bidder must ensure that the host city has adequate transportation facilities and capabilities for those managing, participating in, or spectating the event. The bidder must also provide complimentary and adequate parking arrangements at the site for athletes, Committee Members, and USATF staff.
- **Promotion, Advertising, and Publications:** The bidder must describe their plan for creating awareness of the event through print advertising, publications, digital media and the Internet.
- **Meet Management:** USATF will govern the championships, but the bidder must draft a proposed Championship plan and schedule, in addition to other event details.
- **Officials:** The bidder must utilize USATF certified officials and provide an event hospitality area near the course.
- **Volunteers:** The bidder must provide a plan of recruitment for volunteers in addition to providing amenities such as t-shirts, beverages, snacks and transportation.
- **Safety and Security:** The bidder must ensure the safety of all athletes, as well as provide a detailed security and evacuation plan.

- **Medical:** The bidder must ensure adequate medical services are available throughout the duration of the championships, and certified first-aid providers must be on site at all times to cover the entire facility.

The following table lists the locations of the USA Masters 5K Cross-Country Championships from 2008 through 2014.

Table 5-2

| USA Masters 5K Cross-Country Championships | | |
|---|------------------------|--------------------|
| Year | Site | Location |
| 2014 | Northview Church | Carmel, IN |
| 2013 | Deer Path Park | Flemington, NJ |
| 2012 | Balboa Park | San Diego, CA |
| 2011 | Center Park | Fairport, NY |
| 2010 | National Historic Site | Fort Vancouver, WA |
| 2009 | -- | -- |
| 2008 | Hagan Stone Park | Greensboro, NC |

Source: USATF

The Masters Program offers a variety of opportunities in the sport of track and field and long distant running. Competitions generally take place in five-year age divisions. Age divisions begin at age 30 for track and field and 40 for long distance running.

The following table summarizes the sites of the National Junior Cross-Country Championships from 2007 through 2014.

Table 5-3

| USATF National Junior Cross-Country Championships | | |
|--|---------------------------------|------------------|
| Year | Site | Location |
| 2014 | Whispering Pines Golf Course | Myrtle Beach, SC |
| 2013 | National Shooting Complex | San Antonio, TX |
| 2012 | Balloon Fiesta Park | Albuquerque, NM |
| 2011 | Whispering Pines Golf Course | Myrtle Beach, SC |
| 2010 | Veterans Park | Hoover, AL |
| 2009 | Rancho San Rafael Regional Park | Reno, NV |
| 2008 | Pole Green Park | Hanover, VA |
| 2007 | Rim Rock Farm | Lawrence, KS |

Source: USATF

The top 30 individuals and top five teams in each age group at the Illinois Association Cross-Country Championships advance to the USATF Region Seven Championship. The top 30 individuals and top five teams from each age group at the Region Seven Championships then advance to the National Junior Olympic Cross-Country Championships. The bid process for applying to host the Junior Cross-Country Championships is very similar to the one previously

described. The National Junior Cross-Country Championships annually attract 3,000 athletes from the ages of seven through 18.

The following table lists the USATF Club Cross-Country Championship sites from 2007 through 2014.

Table 5-4

| USATF Club Cross-Country Championships | | |
|--|-------------------------------|------------------|
| Year | Site | Location |
| 2014 | Whispering Pines Golf Course | Myrtle Beach, SC |
| 2013 | Rivers Edge Golf Course | Bend, OR |
| 2012 | Masterson Station Park | Lexington, KY |
| 2011 | Jefferson Park Golf Course | Seattle, WA |
| 2010 | McAlpine Park | Charlotte, NC |
| 2009 | Masterson Station Park | Lexington, KY |
| 2008 | Plantes Ferry Recreation Park | Spokane, WA |
| 2007 | Voice of America Park | West Chester, OH |

Source: USATF

The application process for attracting the Club Championships is similar to that of the National Championships. The USATF Club Cross-Country Championships annually attract 100 teams and 1,200 athletes.

NCAA

Most American universities and colleges field men's and women's cross-country teams as part of their athletic program. More than 900 men's cross-country teams and 1,000 women's cross country teams compete in the three divisions of the National Collegiate Athletic Association. The season culminates in the NCAA National Championships.

The following table summarizes the NCAA Championship sites from 2004 through 2017.

Table 5-5

| NCAA Cross-Country National Championships | | | | | | |
|---|-----------------------------------|-----------------|--|-------------------|-----------------------------------|-----------------|
| Division I | | | Division II | | Division III | |
| Year | Site | Location | Site | Location | Site | Location |
| 2017 | "Tom" Sawyer State Park | Louisville, KY | Missouri Southern Cross-Country Course | Joplin, MO | Lake Breeze Golf Course | Winneconne, WI |
| 2016 | Lavern Gibson Championship Course | Terre Haute, IN | "Tom" Sawyer State Park | Louisville, KY | Golf Center at Kings Island | Mason, OH |
| 2015 | "Tom" Sawyer State Park | Louisville, KY | Plantes Ferry Sports Complex | Spokane, WA | L.S. Ayers Athletic Complex | Hanover, IN |
| 2014 | Lavern Gibson Championship Course | Terre Haute, IN | Missouri Southern Cross-Country Course | Joplin, MO | Lavern Gibson Championship Course | Terre Haute, IN |
| 2013 | Lavern Gibson Championship Course | Terre Haute, IN | Plantes Ferry Sports Complex | Spokane, WA | Lake Breeze Golf Course | Winneconne, WI |
| 2012 | "Tom" Sawyer State Park | Louisville, KY | "Tom" Sawyer State Park | Louisville, KY | Max Cross Country Course | Waverly, IA |
| 2011 | Lavern Gibson Championship Course | Terre Haute, IN | University of Southern Indiana | Evansville, IN | Highland Park Golf Course | Cleveland, OH |
| 2010 | Lavern Gibson Championship Course | Terre Haute, IN | Cooper's Lake Campground | Slippery Rock, PA | L.S. Ayers Athletic Complex | Hanover, IN |
| 2009 | Lavern Gibson Championship Course | Terre Haute, IN | Missouri Southern Cross-Country Course | Joplin, MO | St. Olaf College | Northfield, MN |
| 2008 | Lavern Gibson Championship Course | Terre Haute, IN | Escambia County Equestrian Center | Pensacola, FL | Golf Center at Kings Island | Mason, OH |
| 2007 | Lavern Gibson Championship Course | Terre Haute, IN | Prado Park | Pomona, CA | Dornoch Golf Club | Delaware, OH |
| 2006 | Lavern Gibson Championship Course | Terre Haute, IN | University of Southern Indiana | Evansville, IN | Whitetail Golf Course | Colfax, WI |
| 2005 | Lavern Gibson Championship Course | Terre Haute, IN | SAS Soccer Park | Cary, NC | L.S. Ayers Athletic Complex | Hanover, IN |
| 2004 | Lavern Gibson Championship Course | Terre Haute, IN | Ashland University | Ashland, OH | St. Olaf College | Northfield, MN |

Source: NCAA

As the table shows, the NCAA Championship has primarily been held at the Lavern Gibson Championship Cross-Country Course in Terre Haute, Indiana for Division I Championships. The Division II and Division III Championships have been rotated to numerous facilities over the past ten years. Based on the NCAA's rotation of events, there is an opportunity for Settler's Hill to bid for and possibly host all three division championships.

The following table summarizes the NCAA Midwest regional sites from 2007 through 2017.

Table 5-6

| NCAA Division I Midwest Regional | | |
|----------------------------------|-------------------------------------|-----------------|
| Year | Site | Location |
| 2017 | ISU Cross Country Course | Ames, IA |
| 2016 | TBD | Iowa City, IA |
| 2015 | Rim Rock Farm | Lawrence, KS |
| 2014 | Newman Golf Course | Peoria, IL |
| 2013 | ISU Cross Country Course | Ames, IA |
| 2012 | Missouri State Cross Country Course | Springfield, MO |
| 2011 | Anderson Field | Dekalb, IL |
| 2010 | Newman Golf Course | Peoria, IL |
| 2009 | Missouri State Cross Country Course | Springfield, MO |
| 2008 | OSU Cross Country Course | Stillwater, OK |
| 2007 | Newman Golf Course | Peoria, IL |

Source: NCAA

NCAA regional sites are determined by a vote between the head cross-country coaches in the region. The schedule is determined in three-year intervals, with semi-regions each receiving one regional event. A host school must put together an application with a venue and event plan in order to be eligible for the vote.

Foot Locker

The Footlocker Cross-Country Championships are a series of annual cross-country races held in various regions of the United States to determine the premier cross-country runner in various age groups. The events primarily serve to find the best high school cross-country athletes in the country. The championship event is the longest running national cross-country race for high school students in the United States.

The following figure shows the finish line of the Foot Locker Cross-Country National Championship in San Diego.

Figure 5-1



Annually, there are a total of four regional championships races, usually in late November, that lead up to the National Championship at Balboa Park in San Diego in December. The Midwest Region comprises the heartland states and is by far the biggest region in the series. States in the region include Minnesota, Wisconsin, Iowa, North Dakota, Illinois, Colorado, Kansas, Ohio, Indiana, Missouri and Michigan. The Midwest Regional is held annually at the Wayne E. Dannehl Course at the University of Wisconsin-Parkside.

NIKE

The Nike Cross Nationals, formerly known as Nike Team Nationals, is an invitational cross-country meet that serves as the unofficial team national championship of the United States high school cross-country. It was designed to heighten competition between high school cross-country teams nationwide. The event is part of the Nike Nationals Series, which includes the Nike Indoor Nationals, Nike Outdoor Nationals and Nike Track Nationals.

The following figure shows athletes competing at the Nike Team Nationals.

Figure 5-2



Up until 2007, Nike selected 20 teams from around the country to compete in the event based on national and regional rankings updated throughout the fall cross-country season. After 2007, the new selection system is based on performance at regional events, guaranteeing the top two teams from each region will earn an invite to the national event. Regions include Northwest, Heartland, Midwest, Southwest, South, Southeast, Northeast and New York. The Midwest region is comprised of Indiana, Illinois, Ohio, Michigan and Missouri. The Midwest Regional is held annually at the Lavern Gibson Championship Cross-Country Course in Terre Haute, Indiana.

The national championship event is held on the second weekend of December in Portland, Oregon. The event recently moved to Glendover Golf Course in Portland, having previously been held at Portland Meadows thoroughbred race track. The event features a man-made 5K course that is completed with three loops, following European cross-country tradition.

Implications

There are a variety of courses throughout the country and the Midwest that are hosting USA Track and Field and NCAA events. A course with a dedicated management entity that has proven itself as an elite cross-country venue and can complete the bid application process would be eligible to host one of these high profile and championship events.

However, Nike and Foot Locker are currently hosting their annual regional events at the same locations, Lavern Gibson Championship Cross-Country Course in Terre Haute and Wayne E. Dannehl Course at University of Wisconsin-Parkside. These courses have developed reputations as elite venues in the sport, and a potential course at Settler's Hill will need to do the same in order to attract these high profile regional and national events.

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RECOMMENDATIONS

Discussion of Strengths, Weaknesses, Opportunities and Threats

HSP has used a SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis to evaluate the proposed Settler's Hill Cross-Country Course as it relates to overall market feasibility for Kane County. The analysis draws from the facts surrounding the concept as proposed, Kane County's characteristics and the surrounding community, the facilities and activities that may be considered as competitors in the region as well as comparable facilities.

The application of that analysis is as follows:

Strengths (Existing attributes that are helpful to the Project)

- **Successful Regional Partners/Tenants.** Event organizers in the area are well-known for their respective experience in cross-country and have reputations of providing participants with the opportunity to improve their skills while competing on the high school, collegiate and post-collegiate levels. These groups have expressed an interest in hosting events or expanding operations if rental elements such as facilities, rental agreements and availability can be agreed upon.
- **Sizing/Settler's Hill Cross-Country Course Plan.** The physical plan of the Settler's Hill Cross-Country Course meets the requirements of sanctioning bodies, and if implemented will provide a venue for recreational, state and events that will be one of the best in the region. Various regional groups have confirmed the recommended facilities would meet the need for the majority of their events.
- **Settler's Hill Location.** The current site for the project was already owned by the County prior to the project so there is inherent value. There is an economic benefit for the facility at the current site due to lower development cost through repurposing of a former landfill and the elimination of site acquisition.
- **Parking.** Participants are not willing to walk long distances to park, so the availability of more than 2,500 parking spaces is an asset. The existing parking eliminates the need to occupy more land and build parking, which is expensive. Walkable parking also eliminates the logistical challenges of shuttling participants and spectators to and from offsite parking.
- **Large Regional Population.** Kane County is within a very easy driving range of major cities like Chicago, Indianapolis, Madison, Milwaukee and Minneapolis, as well as St. Louis. This population base of 20+ million in just a few hours' drive provides an extensive list of participant and event opportunities.
- **Access.** Chicago has an excellent commuter train system. Three lines of the Metra System end in Kane County, and the Union Pacific West line has a stop in Geneva, closest to the Settler's Hill site. The Geneva stop is located west of Settler's Hill across

the Fox River and is approximately 2.5 miles from the Settler's Hill entrance on E Fabian Parkway. Although the Settler's Hill site nearly one hour west of Chicago, it is within easy access to arterial interstates, I-88 and I-90.

- **Community Interest.** Interviews with stakeholders in the community reveal a great deal of support for projects that will enhance the county and area, including possible athletic facilities. This was true even of industry stakeholders whose venues included potential competition with a new facility.

Weaknesses (Existing attributes that may hurt the success of the Project)

- **Amenities Incomplete.** Presently the surrounding walkable area has not been built out, so does not have the retail, restaurants, hotels and entertainment nearby that would provide a better onsite experience and aesthetic.
- **Proximity to Chicago.** Although the site is an approximately one hour drive from Chicago, many local groups expressed the site is far enough outside the downtown Chicago area that they would avoid hosting events due to logistical challenges. Also, visitors traveling by airplane and even by car must travel outside of Chicago, leaving the attractions and amenities that Chicago provides. Even though groups expressed the proximity to Chicago as a challenge and weakness, this is not considered to be a significant weakness for Settler's Hill.
- **Difficult Business Models.** The business models for both indoor and outdoor athletic facilities are difficult to make work without ongoing operating losses. Athletic facilities have the best opportunity to generate operating income if there is a robust event schedule on the weekends and consistent use during the week. Sustaining positive operating cash flows at a cross-country course will be very difficult, so this burden must be mitigated by other revenue sources such as concessions, parking and rentals. In comparable cases, the public sector contributed to the development through incentives, infrastructure costs and other funding mechanisms to fund the project during development and with ongoing operating support.

Opportunities (External conditions that will help the feasibility of the Project)

- **Development of Events.** Developing partnerships with local organizations, high school and universities will increase the ability to develop, manage and conduct several events per year that will bring participants and spectators from around the region and potentially the United States.
- **Event Growth.** Currently, many events are limited in size by Forest Preserve sites. Events must limit the number of entries to ensure there is safe utilization of the sites. Additionally, events have been stopped due to over-crowding from spectators that limited site access for emergency vehicles. Settler's Hill would provide existing events a larger venue that would accommodate more team and individual entries, while accommodating large amounts of spectators. The site offers events the opportunity to grow, which would benefit both the event and Settler's Hill financially.

- **Quality of Existing Demand.** The facility as planned will be one of the largest and highest-quality facilities in the region, with a championship-caliber course as well as concessions, parking and other facilities.
- **Economic Development of Surrounding Areas.** Because of the potential for large regional events, as well as the traffic from local and other events, the area surrounding Settler's Hill has the opportunity to develop, especially projects such as hotels and restaurants, retail and specialty services like sports health facilities.
- **Other Possible Partners.** Kane County and the surrounding area are home to many other groups and organizations that may want to partner or use the course. Local groups such as the local school district, student organizations and non-affiliated running organizations may want to practice or hold events at Settler's Hill.

Threats (External conditions that are a threat to the feasibility of the Project)

- **Market Saturation.** Many events around the state already exist, and the organizations and schools that sponsor and manage those events make profits from the events for their programs. Events in Kane County and the surrounding area will want to continue with their events even though the Settler's Hill Cross-Country Course may wish to hold an event on the same day. It is assumed that event organizers may be hesitant, at least in the first few years, to relocate tournaments or events if partnerships have been well established with facilities, sponsors and local businesses at the current location.
- **Scheduling Conflicts.** The intentions of the facility are to provide an environment for the community to achieve an active lifestyle. The facility will also want to host larger scale and high-profile events that will create economic opportunities and growth. The scheduling of the facilities could become difficult due to these two conflicting goals. Based on conversations with industry professionals, establishing a balance of events, programming and community use to meet the needs of local residents and achieve sustainable operations is very challenging. The more events that are scheduled may minimize the available opportunities for local residents to utilize the facilities in order to keep the course in superior condition.
- **Management/Ownership Structure.** A model that many municipalities use to contain costs and maximize usage is to lease the facility to a private organization that manages the facility on behalf of the municipality. One major advantage to this structure is that the municipality bears no ongoing operational costs. The private group and the locality enter into a long-term operating agreement in which the private group manages the facility and pays a specified amount per month or per year to the locality. Some municipalities receive a percentage of the gross revenue of the facility, while others receive a flat rate to pay for a portion of the cost of development plus a small percentage of revenue. Private groups may retain all entrance fees, concession, rentals and other revenue, and provide maintenance for the facility. There are many variations on this format.

However, in the case of Settler's Hill, it is unlikely the events will generate enough revenue to attract a private group to manage the facility as a revenue-generating

enterprise. It is more likely that a non-profit organization of volunteers will be the driving force behind the effort to organize and host events.

- **Competitive Options.** Cross-country courses can be setup and held almost anywhere that can accommodate a course. Forest preserves, parks, golf courses and even school campuses will host events. Although Settler's Hill may offer a high-caliber course option, event organizers may select a more convenient, cost effective and closer venue to host events. Ambitious communities throughout the region may impinge on Settler's Hill market share once it has opened.

Recommendations

Kane County is recommended ensure the proposed cross-country course meets the USA Track and Field course requirements in order to accommodate local, regional and national events. While the reuse of a landfill for a cross-country course is a unique opportunity that has only been implemented in Terre Haute, Indiana, the landfill provides a venue that caters to the participant while providing a spectator-friendly setting. The ability to provide a 360-degree view and ability to watch nearly 100 percent of the course creates an overall experience few venues can achieve. The combination of course and site design along with reputable event management could establish the Settler's Hill Cross-Country Course as one of the premier cross-country destinations in the U.S.

Other Sports Uses on the Same Terrain. Cross-country skiing was concluded to be an unreliable use. There is too much uncertainty about the amount of snow northeastern Illinois will receive as well as the quality of snow cover for event organizers to commit to events in advance. Based on conversations with those in the industry, legitimate cross-country skiing events are not likely to see long-term success here.

Based on multiple significant landfill constraints in terms of site work, landfill cap maintenance and integrity, and ongoing landfill operations and maintenance issues, high impact uses that would cause heavy wear of the landfill surface is not recommended. More active or commercial uses would likely impact or jeopardize the integrity of the landfill cap. It is recommended that use of Settler's Hill be limited to uses such as cross-country running and other passive recreational uses. In addition, other high impact uses on the same terrain would also threaten the quality of the cross-country running course.

Settler's Hill will be an added recreational asset for Kane County residents and visitors. The facility is expected to accommodate passive leisure and recreational uses and will likely be a destination for activities such as walking, jogging, picnics as well as visits to the summit to take in the views. In order to accommodate passive use of Settler's Hill, it is recommended to integrate flexible space areas. Spaces for special events, different types of fitness and exercise classes, programs and activity practices should be added throughout the site that are synergistic with the cross-country course.

The Settler's Hill amenities and activities are meant to yield a lower volume of traffic, and consist of low impact uses that allow visitors to engage in an active lifestyle while maintaining the integrity of

the landfill. Settler's Hill makes efficient recreational use of a massive land space for the surrounding community that would otherwise have remained dormant.

The development of the cross-country course should include the following components in order to optimize Settler's Hill's position in the market and respond to the market that wants to compete at a premier cross-country course.

- A well routed and defined course for runners and viewers alike
 - If a course is well routed and defined, the runners can easily decipher the route and direction of the course path. In addition, a well-defined course enables the runners to know where they are located in the race, both distance wise and in relation to other runners. Flag strips, ropes, netting, arrows, spectator formations, and racing staff often aid runners in going the right direction. However, an extraordinarily well-defined path may include edging of hills, trees, or tall grasses.
 - A well-routed course necessitates little or no path crossing for the viewers or coaches. Crossing the course path is difficult and hard to maneuver back and forth for the spectator and also distracts the runners. A well-routed course for viewers allows for minimal spectator movement while still providing a view of many parts of the race.
 - A well-routed course also allows viewers, coaches, and officials the opportunity to locate themselves in less crowded viewing areas. The ability to seclude oneself in a less crowded area creates an opportunity for coaches or other viewers to be heard and to aid the runners in what is going on behind them. Creating such an opportunity also allows supporters to help and cheer for the runners through more isolated areas of the race.
 - Maps, signs, or well-defined pathway markers guide spectators. Maps or signs aid spectators in selecting the best viewing location(s) for their needs, and desires.
- Viewer friendliness
 - Viewer friendliness is present in a course that provides as many viewing opportunities possible no matter what the land dictates. In addition, a course that offers easy access to the viewing points offers elements available in a viewer friendly course. For some spectators, courses that require little to no movement to see the entire, or almost the entire race, is what creates a pleasurable course.
- A course with a distinctive atmosphere and has a "sense of place."
 - Many elements play into capturing a unique and desired sense of place. The excitement, motivation, and sensations which an athlete, spectator, or coach may feel is surrounding or captivating them will help establish a reputation for the course.
 - A strong and desired sense of place is achieved by utilizing the site's natural characteristics, its surroundings, and by capitalizing on elements that make a course unique and beyond comparison.

- Fast and refined courses
 - An uncomplicated course is one that has very few, if any, challenging components.
 - Courses susceptible to fast times may vary in hill length and height, elevation change, and featured small obstacles. Firm ground, whether grass, gravel, or dirt, in addition to minimal obstacles adds to the ability of attaining faster times. These courses may or may not be highly manmade.
- Well organized, designed, and planned facilities
 - A course consistent with well-planned facilities consists of restrooms near the beginning of the race, as well as other nicer restrooms, benches, and possibly shelters for severe weather.
 - The design of the course has considered official, coach, viewer, and athlete movements, camera setup locations, power locations, a well thought out start/finish area, and other conveniences. In addition, parking for visitors and athletes will be well defined and signs or other maps will be used to help visitors locate the race course.
 - The course design has optimal viewing and sight lines that would allow events to be televised. Spectator areas are mostly on a high ground above the course, between the starting and finishing line, so that nearly the entire course can be seen from the viewing grounds.
- Safety
 - Safety for cross country athletes appears in many forms, although the most common safety issues are usually thought to be the course structure, terrain, surfacing, and pathway configuration. Safe courses do not have barbed wire crossings, but also obstacles such as extremely uneven surfaces and disastrous downhill sections. In addition, crowd control and abiding by the maximum carrying capacity for runners and viewers alike will significantly add to improved safety.
- Courses designed for the athlete
 - Components such as landmarks for reference, differing terrain and surfacing, varied environments, and other such components can contribute to a course designed to benefit the athlete. Varied environments spawn interest and motivate athletes to discover each successive segment of the race subsequently providing a unique experience throughout each environment. In this way courses offer runners one of the most sport specific aspects of cross-country and athletes experience a continually unfolding experience of new and surprising landscapes.
 - Athlete challenge does not mean there are high fences to maneuver or long steep inclines, but that the athlete feels they encountered, responded to, imposing course impediments throughout the race. A course designed for the athlete will create a unique opportunity and experience for the athlete taking part in the race.

Other critical components for the Settler's Hill Cross Country-Course include:

- **Timing Equipment:** Timing equipment is one of the most critical components to races. Onsite timing equipment provides a turnkey solution for event organizers if they don't prefer their own equipment. Additionally, this provides an opportunity for the operator to host its own events in a more efficient manner.
- **Restrooms:** One of the largest event related expenses are portable restrooms. Permanent restrooms onsite will help reduce event costs and provide event organizers with a value-added amenity. In addition, the closer the restrooms are located to the start line the better. Based on feedback from other venues, participants have a tendency to utilize restrooms prior to the start of races and the proximate location provides a needed convenience.
- **Parking:** A common complaint among event organizers is that venues do not have enough parking to accommodate events. Currently there are 2,530 parking spaces at the three adjacent sports venues to Settler's Hill. This is more than what comparable and competitive venues that host local and national events have. However, onsite parking should be provided for event staff and vendors as well as have the capacity to accommodate media vehicles.
- **Concessions:** An efficient concessions operation should be included on the facility. Given that events are often early and can last all day, the concession options should go beyond the basics and provide more robust options, especially until more nearby walkable restaurants are developed.
- **Sponsorships:** Advertising and sponsorship opportunities should be considered as possible revenue source for the Settler's Hill Cross-Country Course. Given the potential revenue amounts associated with advertising, sponsorship and naming rights, these are key factors to help offset operating expenses.
- **Areas for event organizers and staff:** Event organizers need locations for event headquarters to conduct their business and meetings. Also, tournament officials and referees regularly do not have a base location to change or operate from. Two small meeting rooms, with bathrooms.
- **Activation Space:** Offer sufficient space for vendors/concessionaires to operate during events.

Governance. Based on HSP's analysis of the governance, management and marketing structures for cross-country courses, it is recommended that the County and other key stakeholders initiate a more in-depth discussion of how Settler's Hill be managed and operated. Key elements to consider will be the alignment of responsibilities and resources, calendar management, marketing, maintenance, event and operating costs. While dedicated cross-country courses are few and far between, and the few that are working remarkably well due to a can-do attitude and expertise from both industry professionals and event experts, there may be opportunities to set up structures that can minimize operating deficits and minimize the reliance on outside funding sources.

These types of facilities are businesses and must be responsive to the needs of the market. When well-run, they can generate net income for the owner. If treated as a public amenity, they can cause

significant financial deficits, which would be covered by the owner – in this case the County and/or Forest Preserve. As such, it is recommended a separate enterprise entity should be created or contracted to operate the facility. The goal for the facility will be to both generate economic and fiscal impacts as well as maximize revenue and minimize expenses.

However, the limited number of events at Settler's Hill and resulting potential revenue will likely not be lucrative enough to attract a for-profit operator to manage and drive revenues. The investment into operations, marketing and management will not justify the expected revenue generation from the facility. As a result, a non-profit and volunteer-based management operation will be the most likely situation similar to the LaVern Gibson Cross-Country Course. The Terre Haute, Convention and Visitors Bureau, Indiana State University and other area organizations provide volunteers and support to operate the facility. The local tourism entities in Kane County, should form a symbiotic relationship with area cross-country organizations and organizing committees to orchestrate tournament bids, housing (hotel) management and destination packages that funnel spending and impact to Kane County hotels and other businesses.

These proactive, market-based and tourism-responsive steps will help Settler's Hill succeed as a competitive market-based operation, even if owned publicly.

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DEMAND AND FINANCIAL PROJECTIONS

In this chapter, HSP provides estimates of performance for different categories of uses. The projection model utilized assumes that Settler's Hill will be used primarily for cross-country and outdoor race events, but may host an occasional other low-impact sporting or non-sporting event. The facility has been designed to not only accommodate but also attract area users, organizations and high-profile events. Conversations with leadership of local athletic organizations, high school and university athletic department staff, as well as civic and business stakeholders have all suggested there is desire for the Project, but it will be a very niche development and use. Based on feedback provided by local and regional stakeholders, the demand and financial projections are based on the following assumptions:

- The 240-acre Settler's Hill site will be designed to meet course specifications of USA Track and Field. The course will be able to accommodate all age and competition levels from a local, regional and national level.
 - The course will be able to accommodate 2K, 3K, 4K, 3-mile, 5K, 6K, 8K, and 10K races.
 - All runners will be equidistant from the start line to the first turn.
 - The first turn will be 500 meters due to site constraints.
 - The course width will not be less than ten meters wide and a one-meter wide obstacle-free zone will exist on the outside and inside of the course.
 - The last 200 meters of the course will be straight, flat and at least ten meters wide.
- The cross-country course will be owned by Kane County however, operated and marketed by a third-party entity that will have prior experience and knowledge in organizing, securing and executing cross-country events.
- There are no primary tenants that would have priority on dates or times of use during the year.
- The model includes the assumption that the cross-country course captures a rental rate for use of the facility.

Settler's Hill Cross-Country Course Projections

The Settler's Hill site is expected to attract and host a variety of cross-country and outdoor race events and has the potential to host one or more local groups, such as high school and collegiate cross-country programs. No local tenant groups have been assumed at this point. The Settler's Hill Cross-Country Course is expected to accommodate a combination of local and possibly regional and national events, depending on the level of marketing efforts as well as commitment from volunteer stakeholders. Based on the programming levels of the course, there are opportunities to accommodate unmet demand and capture demand that is currently leaving the area or using other venues such as forest preserves, parks and golf courses.

The assumptions for the event demand are as follows:

- **Open Events.** Registration classifications shall have no maximum age limit. In men's and women's long distance running, the Open classification allows athletes 16 years and older on the day of the competition. In Open men's race walking and all other Open women's competition, athletes are allowed to be 14 years or older on the day of the competition to participate.
- **Youth Events.** The Youth classification is limited to athletes who have not attained 19 years of age as of the final day of the National Junior Olympic Track and Field meet of the year of competition.
- **Masters Events.** In Track and Field and Race Walking, the Masters classification is limited to athletes who are at least 35 years old on the first day of the event. In Long Distance Running, the Masters classification shall be limited to athletes who are at least 40 years old on the first day of the event.
- **High School Events.** These events will include high school regular season cross-country meets and invitationals. IHSA high school events include post-season events such as regionals, sectionals and conference championships. These events occur between the months of August and November.
- **Collegiate Events.** These events will include regular season cross-country meets and invitationals for D-I, D-II and D-III athletic programs. Other collegiate events include post-season events such conference championships and national championships. These events occur between the months of August and November.
- **Community Runs.** A community or fun run is a friendly race that where participants take part for their own enjoyment rather than competition. Events are usually held to raise funds for a charity, with sponsors providing the revenue to cover organizational costs.
- **Other Low Impact Sporting Events.** This category includes sporting events not related to track and field, and maintains a passive use to stay in accordance with Waste Management site management constraints and the Kane County Forest Preserve District policies. Events may include Frisbee golf competitions, large-scale fitness instructions and others.
- **Non-Sporting Events.** This category includes relatively unique events that are not considered in the other event categories. Events may include festivals, movie-in-the-park and other community-oriented events.

The following table shows the number of annual events assumed for each event type.

Table 7-1

| Projected Schedule of Events by Category and Year | | | | | | | | | | |
|---|----------|----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| Category | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 | Year 6 | Year 7 | Year 8 | Year 9 | Year 10 |
| Existing Events | | | | | | | | | | |
| High School | 1 | 1 | 1 | 2 | 2 | 2 | 2 | 3 | 3 | 3 |
| IHSA Sectional | 1 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 |
| IHSA Regional | 1 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 |
| Collegiate | 0 | 0 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| Community Runs | 1 | 1 | 1 | 1 | 2 | 2 | 2 | 2 | 2 | 2 |
| New Events | | | | | | | | | | |
| High School | 0 | 0 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| Collegiate | 0 | 0 | 0 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| Community Runs | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| Open | 1 | 1 | 1 | 1 | 2 | 2 | 2 | 2 | 2 | 2 |
| Youth | 0 | 0 | 0 | 0 | 1 | 1 | 1 | 1 | 1 | 1 |
| Master's | 0 | 0 | 0 | 0 | 0 | 1 | 1 | 1 | 1 | 1 |
| Other Low Impact Sporting Events | 0 | 0 | 0 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| Non-Sporting Event | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| Total | 7 | 9 | 11 | 14 | 17 | 18 | 18 | 19 | 19 | 19 |

Source: Hunden Strategic Partners

As shown, the number of events is projected to increase from seven in year one to 19 by stabilization in year eight, with each event being one day. Of the events, high school, collegiate and community runs are expected to relocate some existing events in the area to Settler's Hill. High School events are expected to increase to eight by stabilization. Additionally, it is assumed Settler's Hill will secure open, youth and master's events as well.

The projections assume Settler's Hill will be primarily used for high school events, while efforts will be made to secure collegiate, large destination events and championships. Additionally, community runs are expected to be limited in order to keep the course in like-new condition for high school, collegiate and championship events.

The next table shows the number of expected participants by event type.

Table 7-2

| Projected Participants by Category and Year | | | | | | | | | | |
|---|--------------|--------------|--------------|--------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Category | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 | Year 6 | Year 7 | Year 8 | Year 9 | Year 10 |
| Existing Events | | | | | | | | | | |
| High School | 1,200 | 1,212 | 1,224 | 2,473 | 2,497 | 2,522 | 2,548 | 3,860 | 3,898 | 3,937 |
| IHSA Sectional | 280 | 560 | 560 | 560 | 560 | 560 | 560 | 560 | 560 | 560 |
| IHSA Regional | 125 | 250 | 250 | 250 | 250 | 250 | 250 | 250 | 250 | 250 |
| Collegiate | 0 | 0 | 459 | 464 | 468 | 473 | 478 | 482 | 487 | 492 |
| Community Runs | 500 | 515 | 530 | 546 | 1,126 | 1,159 | 1,194 | 1,230 | 1,267 | 1,305 |
| New Events | | | | | | | | | | |
| High School | 0 | 0 | 832 | 849 | 866 | 883 | 901 | 919 | 937 | 956 |
| Collegiate | 0 | 0 | 0 | 464 | 468 | 473 | 478 | 482 | 487 | 492 |
| Community Runs | 400 | 412 | 424 | 437 | 450 | 464 | 478 | 492 | 507 | 522 |
| Open | 1,200 | 1,224 | 1,248 | 1,273 | 2,598 | 2,650 | 2,703 | 2,757 | 2,812 | 2,868 |
| Youth | 0 | 0 | 0 | 0 | 1,082 | 1,104 | 1,126 | 1,149 | 1,172 | 1,195 |
| Master's | 0 | 0 | 0 | 0 | 0 | 442 | 450 | 459 | 469 | 478 |
| Other Low Impact Sporting Events | 0 | 0 | 0 | 265 | 271 | 276 | 282 | 287 | 293 | 299 |
| Non-Sporting Event | 1,500 | 1,545 | 1,591 | 1,639 | 1,688 | 1,739 | 1,791 | 1,845 | 1,900 | 1,957 |
| Total | 5,205 | 5,718 | 7,120 | 9,220 | 12,325 | 12,995 | 13,238 | 14,772 | 15,039 | 15,312 |

Source: Hunden Strategic Partners

Settler's Hill is projected to host approximately 5,200 participants in the first year. The scenario expects more than 15,000 participants will compete at Settler's Hill by the end of the period.

The following table shows the expected number of spectators visiting Settler's Hill annually for various events.

Table 7-3

| Projected Spectators by Category and Year | | | | | | | | | | |
|---|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Category | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 | Year 6 | Year 7 | Year 8 | Year 9 | Year 10 |
| Existing Events | | | | | | | | | | |
| High School | 3,000 | 3,030 | 3,060 | 6,182 | 6,244 | 6,306 | 6,369 | 9,649 | 9,746 | 9,843 |
| IHSA Sectional | 2,240 | 4,480 | 4,480 | 4,480 | 4,480 | 4,480 | 4,480 | 4,480 | 4,480 | 4,480 |
| IHSA Regional | 1,000 | 2,000 | 2,000 | 2,000 | 2,000 | 2,000 | 2,000 | 2,000 | 2,000 | 2,000 |
| Collegiate | 0 | 0 | 597 | 603 | 609 | 615 | 621 | 627 | 633 | 640 |
| Community Runs | 1,000 | 1,030 | 1,061 | 1,093 | 2,251 | 2,319 | 2,388 | 2,460 | 2,534 | 2,610 |
| New Events | | | | | | | | | | |
| High School | 0 | 0 | 1,665 | 1,698 | 1,732 | 1,767 | 1,802 | 1,838 | 1,875 | 1,912 |
| Collegiate | 0 | 0 | 0 | 603 | 609 | 615 | 621 | 627 | 633 | 640 |
| Community Runs | 800 | 824 | 849 | 874 | 900 | 927 | 955 | 984 | 1,013 | 1,044 |
| Open | 2,160 | 2,203 | 2,247 | 2,292 | 4,676 | 4,770 | 4,865 | 4,962 | 5,062 | 5,163 |
| Youth | 0 | 0 | 0 | 0 | 2,165 | 2,208 | 2,252 | 2,297 | 2,343 | 2,390 |
| Master's | 0 | 0 | 0 | 0 | 0 | 574 | 586 | 597 | 609 | 621 |
| Other Low Impact Sporting Events | 0 | 0 | 0 | 332 | 338 | 345 | 352 | 359 | 366 | 373 |
| Non-Sporting Event | 1,950 | 2,009 | 2,069 | 2,131 | 2,195 | 2,261 | 2,328 | 2,398 | 2,470 | 2,544 |
| Total | 12,150 | 15,576 | 18,027 | 22,287 | 28,198 | 29,186 | 29,620 | 33,279 | 33,765 | 34,260 |

Source: Hunden Strategic Partners

Based on the assumptions, HSP projects more than 33,000 family and friends will attend events annually by stabilization. Of these, high school events will account for nearly 18,000 spectators,

followed by open and community runs. Generally, the younger the participants the more family and friends attend events.

The next table shows the total number of visitors (participants and spectators) expected at Settler's Hill.

Table 7-4

| Category | Projected Attendance by Category and Year | | | | | | | | | |
|----------------------------------|---|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 | Year 6 | Year 7 | Year 8 | Year 9 | Year 10 |
| Existing Events | | | | | | | | | | |
| High School | 4,200 | 4,242 | 4,284 | 8,655 | 8,741 | 8,828 | 8,917 | 13,509 | 13,644 | 13,780 |
| IHSA Sectional | 2,520 | 5,040 | 5,040 | 5,040 | 5,040 | 5,040 | 5,040 | 5,040 | 5,040 | 5,040 |
| IHSA Regional | 1,125 | 2,250 | 2,250 | 2,250 | 2,250 | 2,250 | 2,250 | 2,250 | 2,250 | 2,250 |
| Collegiate | 0 | 0 | 1,056 | 1,066 | 1,077 | 1,088 | 1,099 | 1,110 | 1,121 | 1,132 |
| Community Runs | 1,500 | 1,545 | 1,591 | 1,639 | 3,377 | 3,478 | 3,582 | 3,690 | 3,800 | 3,914 |
| New Events | | | | | | | | | | |
| High School | 0 | 0 | 2,497 | 2,547 | 2,598 | 2,650 | 2,703 | 2,757 | 2,812 | 2,868 |
| Collegiate | 0 | 0 | 0 | 1,066 | 1,077 | 1,088 | 1,099 | 1,110 | 1,121 | 1,132 |
| Community Runs | 1,200 | 1,236 | 1,273 | 1,311 | 1,351 | 1,391 | 1,433 | 1,476 | 1,520 | 1,566 |
| Open | 3,360 | 3,427 | 3,496 | 3,566 | 7,274 | 7,419 | 7,568 | 7,719 | 7,874 | 8,031 |
| Youth | 0 | 0 | 0 | 0 | 3,247 | 3,312 | 3,378 | 3,446 | 3,515 | 3,585 |
| Master's | 0 | 0 | 0 | 0 | 0 | 1,016 | 1,036 | 1,057 | 1,078 | 1,099 |
| Other Low Impact Sporting Events | 0 | 0 | 0 | 597 | 609 | 621 | 633 | 646 | 659 | 672 |
| Non-Sporting Event | 3,450 | 3,554 | 3,660 | 3,770 | 3,883 | 3,999 | 4,119 | 4,243 | 4,370 | 4,501 |
| Total | 17,355 | 21,294 | 25,147 | 31,507 | 40,523 | 42,181 | 42,857 | 48,052 | 48,804 | 49,572 |

Source: Hunden Strategic Partners

Total visitation is projected to increase from approximately 17,300 to more than 48,000 by stabilization, depending on the number of events held. High school and open events will be the primary drivers for visitation.

Financial Projections

The next table is a consolidated estimate of revenue and expense for the Settler's Hill.

Table 7-5

| Settler's Hill Financial Projection (thousands of inflated dollars) | | | | | | | | | | |
|--|--------------------|----------------|----------------|---------------|---------------|---------------|---------------|---------------|---------------|----------------|
| Item | Fiscal Year | | | | | | | | | |
| | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 | Year 6 | Year 7 | Year 8 | Year 9 | Year 10 |
| Operating Revenue | | | | | | | | | | |
| Rent | \$26 | \$34 | \$44 | \$59 | \$74 | \$82 | \$84 | \$91 | \$94 | \$97 |
| Concession | \$3 | \$3 | \$4 | \$5 | \$7 | \$7 | \$8 | \$9 | \$9 | \$10 |
| Parking | \$17 | \$31 | \$35 | \$50 | \$68 | \$70 | \$70 | \$88 | \$89 | \$90 |
| Total Revenue | \$46 | \$69 | \$83 | \$113 | \$149 | \$159 | \$162 | \$188 | \$192 | \$196 |
| Operating Expense | | | | | | | | | | |
| Fixed | | | | | | | | | | |
| Salary - Permanent Staff | \$68 | \$70 | \$72 | \$74 | \$77 | \$79 | \$81 | \$84 | \$86 | \$89 |
| Benefits - Permanent Staff | \$22 | \$23 | \$24 | \$25 | \$25 | \$26 | \$27 | \$28 | \$28 | \$29 |
| General and Administrative | \$18 | \$19 | \$19 | \$20 | \$21 | \$21 | \$22 | \$23 | \$23 | \$24 |
| Utilities | \$2 | \$2 | \$3 | \$3 | \$3 | \$3 | \$3 | \$3 | \$3 | \$3 |
| Repairs and Maintenance | \$45 | \$46 | \$48 | \$49 | \$51 | \$52 | \$54 | \$55 | \$57 | \$59 |
| Insurance | \$10 | \$10 | \$11 | \$11 | \$11 | \$12 | \$12 | \$12 | \$13 | \$13 |
| Communications | \$2 | \$2 | \$2 | \$2 | \$2 | \$2 | \$2 | \$2 | \$3 | \$3 |
| Advertising | \$20 | \$21 | \$21 | \$22 | \$23 | \$23 | \$24 | \$25 | \$25 | \$26 |
| Misc. | \$3 | \$3 | \$3 | \$3 | \$3 | \$3 | \$3 | \$3 | \$3 | \$3 |
| Total Expenses | \$191 | \$196 | \$202 | \$208 | \$215 | \$221 | \$228 | \$234 | \$241 | \$249 |
| Net Operating Income (Deficit) | (\$145) | (\$127) | (\$120) | (\$95) | (\$66) | (\$63) | (\$65) | (\$46) | (\$49) | (\$53) |
| Deposit to Maintenance Reserve | \$1 | \$2 | \$2 | \$3 | \$4 | \$5 | \$5 | \$6 | \$6 | \$6 |
| Net Operating Income | (\$146) | (\$129) | (\$122) | (\$98) | (\$70) | (\$67) | (\$70) | (\$52) | (\$55) | (\$59) |

Source: Hunden Strategic Partners

The model assumes each user group or event organizer rent to use the facility, however local schools (secondary and post-secondary) generally pay a lower rental rate, similar to how an anchor retail tenant in a mall pays lower rent per square foot as they guarantee consistent usage and demand.

As shown, rental fees are projected to be the largest revenue source, stabilizing at more than \$94,000. Net concessions and parking/admissions make up other significant revenue sources. For concessions, the projections assume a revenue share with the host user group. Concessions are a significant funding source for high school booster programs. The facility shares a minority percentage (15 percent) of gross sales. Parking/Admission fees are expected for all events. The user groups and event organizers would take the risk for and receive most of the revenue for concessions and any merchandise sales. The assumptions for these figures were based on similar facilities and event operations. Given the limited number of events, potential revenue amounts associated with advertising, sponsorship and naming rights were not assumed but are recommended. Additionally, sponsorships for race events, like title rights, are secured by the event organizer since races are one-day events and typically in public spaces.

The following table shows the various demand and operating assumptions used to calculate the demand and financial projections.

Table 7-6

| Settler's Hill Cross-Country Course Demand and Financial Projections | | | | | | |
|--|-------------------|----------------------------|------------------|--------------------------|-------------------------------|------------------------|
| Category | Avg. Participants | Spectators per Participant | Avg. Rental Rate | Concession Spend Per Cap | Parking/Admission per Vehicle | Spectators per Vehicle |
| Existing Events | | | | | | |
| High School | 1,200 | 2.50 | \$3,500 | \$1.00 | \$5.00 | 3 |
| IHSA Sectional | 280 | 8.00 | \$3,500 | \$1.25 | \$5.00 | 3 |
| IHSA Regional | 125 | 8.00 | \$3,500 | \$1.25 | \$5.00 | 3 |
| Collegiate | 450 | 1.30 | \$4,000 | \$1.00 | \$5.00 | 3 |
| Community Runs | 500 | 2.00 | \$3,000 | \$0.50 | \$5.00 | 3 |
| New Events | | | | | | |
| High School | 800 | 2.00 | \$3,500 | \$1.00 | \$5.00 | 3 |
| Collegiate | 450 | 1.30 | \$4,000 | \$1.00 | \$5.00 | 3 |
| Community Runs | 400 | 2.00 | \$3,000 | \$0.50 | \$5.00 | 3 |
| Open | 1,200 | 1.80 | \$4,500 | \$0.75 | \$5.00 | 3 |
| Youth | 1,000 | 2.00 | \$4,500 | \$1.00 | \$5.00 | 3 |
| Master's | 400 | 1.30 | \$4,500 | \$1.00 | \$5.00 | 3 |
| Other Low Impact Sporting Events | 250 | 1.25 | \$4,500 | \$0.25 | \$5.00 | 3 |
| Non-Sporting Event | 1,500 | 1.30 | \$4,500 | \$1.25 | \$5.00 | 3 |

Source: Hunden Strategic Partners

However, event demand and seasonal cycles are not always consistent. Business can be affected by unpredictable local and national economic factors. Event demand is often cyclical, based on sports seasons and market conditions. Therefore, HSP recommends interpreting the financial projections as a mid-point of a range of possible outcomes and over a multi-year period rather than relying on projections for any one specific year.

On the expense side, staffing and facility repairs and maintenance are the two largest items. Other major costs include administrative, insurance and advertising. Events are held during the mornings and early afternoons, requiring little utilities, if any. In total, the facility is expected to experience a net deficit of \$146,000 in year one and the deficit is expected to stabilize at approximately \$50,000 by the tenth year, if the assumptions in this report are enacted. The assumptions for the expense line items are explained as follows:

- Fixed expense metrics were taken from comparable facilities, taking into consideration rates specific to Kane County.
- The salaries for permanent and part-time/seasonal staff were assumed based on Kane County's staff compensation. Benefits are assumed to be 33 percent of the permanent staff's salaries.
- The expenses associated with general and administrative needs were assumed to be comparable to similar facilities analyzed. Expenses considered in the assumption were rentals, travel, supplies, facility services, legal and other operating expenses.
- Utilities expense is based on similar expenses incurred at the LaVern Gibson Cross-Country Course, which is also a reuse of a closed landfill. Management stated that average utility costs are minimal and less than \$5,000 annually. It was assumed the County would use recycled water for any use on Settler's Hill.

- Maintenance needs are assumed to meet the standards of comparable facilities; primarily the LaVern Gibson Cross-Country Course. The LaVern Gibson Cross-Country Course has an estimated annual cost of \$50,000 per year. Course maintenance costs are primarily to maintain the course due to the ongoing settlement of the landfill.
- The visual identity and character of the Settler's Hill Cross-Country Course presented in communication materials will impact the way in which the facility is perceived by users, visitors and outside groups. The image of the facility in many instances will be the first element, which targeted users and groups will see when they learn about or come in contact with the facility. Communication and marketing materials are assumed to reflect comparable facilities as well as costs incurred when organizing a bid package for a high profile event or championship.

The next tables show the detail associated with concessions, the first table shows the gross concessions.

Table 7-7

| Projected Gross Concession Revenue by Category and Year | | | | | | | | | | |
|---|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| Category | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 | Year 6 | Year 7 | Year 8 | Year 9 | Year 10 |
| Existing Events | | | | | | | | | | |
| High School | \$4,326 | \$4,500 | \$4,682 | \$9,741 | \$10,133 | \$10,542 | \$10,967 | \$17,113 | \$17,802 | \$18,520 |
| IHSA Sectional | \$3,245 | \$6,684 | \$6,884 | \$7,091 | \$7,303 | \$7,523 | \$7,748 | \$7,981 | \$8,220 | \$8,467 |
| IHSA Regional | \$1,448 | \$2,984 | \$3,073 | \$3,165 | \$3,260 | \$3,358 | \$3,459 | \$3,563 | \$3,670 | \$3,780 |
| Collegiate | \$0 | \$0 | \$1,154 | \$1,200 | \$1,249 | \$1,299 | \$1,351 | \$1,406 | \$1,462 | \$1,521 |
| Community Runs | \$773 | \$820 | \$869 | \$922 | \$1,957 | \$2,076 | \$2,203 | \$2,337 | \$2,479 | \$2,630 |
| New Events | | | | | | | | | | |
| High School | \$0 | \$0 | \$2,728 | \$2,867 | \$3,012 | \$3,164 | \$3,324 | \$3,492 | \$3,669 | \$3,855 |
| Collegiate | \$0 | \$0 | \$0 | \$1,200 | \$1,249 | \$1,299 | \$1,351 | \$1,406 | \$1,462 | \$1,521 |
| Community Runs | \$618 | \$656 | \$696 | \$738 | \$783 | \$831 | \$881 | \$935 | \$992 | \$1,052 |
| Open | \$2,596 | \$2,727 | \$2,865 | \$3,010 | \$6,324 | \$6,644 | \$6,981 | \$7,334 | \$7,705 | \$8,095 |
| Youth | \$0 | \$0 | \$0 | \$0 | \$3,765 | \$3,955 | \$4,155 | \$4,365 | \$4,586 | \$4,818 |
| Master's | \$0 | \$0 | \$0 | \$0 | \$0 | \$1,213 | \$1,274 | \$1,339 | \$1,406 | \$1,478 |
| Other Low Impact Sporting Events | \$0 | \$0 | \$0 | \$168 | \$176 | \$185 | \$195 | \$205 | \$215 | \$226 |
| Non-Sporting Event | \$4,442 | \$4,712 | \$4,999 | \$5,304 | \$5,627 | \$5,970 | \$6,333 | \$6,719 | \$7,128 | \$7,562 |
| Total | \$17,447 | \$23,082 | \$27,951 | \$35,406 | \$44,838 | \$48,058 | \$50,222 | \$58,193 | \$60,797 | \$63,524 |

Source: Hunden Strategic Partners

Concessions are expected to be highest during high school events and it is assumed that 15 percent accrues to the facility.

Table 7-8

| Projected Net Concession Revenue by Category and Year | | | | | | | | | | |
|---|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Category | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 | Year 6 | Year 7 | Year 8 | Year 9 | Year 10 |
| Existing Events | | | | | | | | | | |
| High School | \$649 | \$675 | \$702 | \$1,461 | \$1,520 | \$1,581 | \$1,645 | \$2,567 | \$2,670 | \$2,778 |
| IHSA Sectional | \$487 | \$1,003 | \$1,033 | \$1,064 | \$1,096 | \$1,128 | \$1,162 | \$1,197 | \$1,233 | \$1,270 |
| IHSA Regional | \$217 | \$448 | \$461 | \$475 | \$489 | \$504 | \$519 | \$534 | \$550 | \$567 |
| Collegiate | \$0 | \$0 | \$173 | \$180 | \$187 | \$195 | \$203 | \$211 | \$219 | \$228 |
| Community Runs | \$116 | \$123 | \$130 | \$138 | \$294 | \$311 | \$330 | \$351 | \$372 | \$395 |
| New Events | | | | | | | | | | |
| High School | \$0 | \$0 | \$409 | \$430 | \$452 | \$475 | \$499 | \$524 | \$550 | \$578 |
| Collegiate | \$0 | \$0 | \$0 | \$180 | \$187 | \$195 | \$203 | \$211 | \$219 | \$228 |
| Community Runs | \$93 | \$98 | \$104 | \$111 | \$117 | \$125 | \$132 | \$140 | \$149 | \$158 |
| Open | \$389 | \$409 | \$430 | \$451 | \$949 | \$997 | \$1,047 | \$1,100 | \$1,156 | \$1,214 |
| Youth | \$0 | \$0 | \$0 | \$0 | \$565 | \$593 | \$623 | \$655 | \$688 | \$723 |
| Master's | \$0 | \$0 | \$0 | \$0 | \$0 | \$182 | \$191 | \$201 | \$211 | \$222 |
| Other Low Impact Sporting Events | \$0 | \$0 | \$0 | \$25 | \$26 | \$28 | \$29 | \$31 | \$32 | \$34 |
| Non-Sporting Event | \$666 | \$707 | \$750 | \$796 | \$844 | \$895 | \$950 | \$1,008 | \$1,069 | \$1,134 |
| Total | \$2,617 | \$3,462 | \$4,193 | \$5,311 | \$6,726 | \$7,209 | \$7,533 | \$8,729 | \$9,120 | \$9,529 |

Source: Hunden Strategic Partners

Net concessions are expected to increase from more than \$2,500 to more than \$9,000.

The following table shows the projected parking revenue generated by events at Settler's Hill.

Table 7-9

| Projected Parking Revenue by Category and Year | | | | | | | | | | |
|--|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|------------------|------------------|------------------|
| Category | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 | Year 6 | Year 7 | Year 8 | Year 9 | Year 10 |
| Total # of Spaces | 2,745 | 2,745 | 2,745 | 2,745 | 2,745 | 2,745 | 2,745 | 2,745 | 2,745 | 2,745 |
| Parking Fee | \$5.00 | \$5.00 | \$5.00 | \$5.00 | \$5.00 | \$5.00 | \$5.00 | \$5.00 | \$5.00 | \$5.00 |
| Attendees per Car | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Existing Events | | | | | | | | | | |
| High School | \$5,000 | \$5,050 | \$5,101 | \$20,606 | \$20,812 | \$21,020 | \$21,230 | \$41,175 | \$41,175 | \$41,175 |
| IHSA Sectional | \$3,733 | \$14,933 | \$14,933 | \$14,933 | \$14,933 | \$14,933 | \$14,933 | \$14,933 | \$14,933 | \$14,933 |
| IHSA Regional | \$1,667 | \$6,667 | \$6,667 | \$6,667 | \$6,667 | \$6,667 | \$6,667 | \$6,667 | \$6,667 | \$6,667 |
| Collegiate | \$0 | \$0 | \$995 | \$1,005 | \$1,015 | \$1,025 | \$1,035 | \$1,045 | \$1,056 | \$1,066 |
| Community Runs | \$1,667 | \$1,717 | \$1,768 | \$1,821 | \$7,503 | \$7,728 | \$7,960 | \$8,199 | \$8,445 | \$8,698 |
| New Events | | | | | | | | | | |
| High School | \$0 | \$0 | \$2,774 | \$2,830 | \$2,886 | \$2,944 | \$3,003 | \$3,063 | \$3,124 | \$3,187 |
| Collegiate | \$0 | \$0 | \$0 | \$1,005 | \$1,015 | \$1,025 | \$1,035 | \$1,045 | \$1,056 | \$1,066 |
| Community Runs | \$1,333 | \$1,373 | \$1,415 | \$1,457 | \$1,501 | \$1,546 | \$1,592 | \$1,640 | \$1,689 | \$1,740 |
| Open | \$3,600 | \$3,672 | \$3,745 | \$3,820 | \$15,587 | \$15,899 | \$16,217 | \$16,541 | \$16,872 | \$17,209 |
| Youth | \$0 | \$0 | \$0 | \$0 | \$3,608 | \$3,680 | \$3,754 | \$3,829 | \$3,906 | \$3,984 |
| Master's | \$0 | \$0 | \$0 | \$0 | \$0 | \$957 | \$976 | \$996 | \$1,015 | \$1,036 |
| Other Low Impact Sporting Events | \$0 | \$0 | \$0 | \$553 | \$564 | \$575 | \$587 | \$598 | \$610 | \$622 |
| Non-Sporting Event | \$3,250 | \$3,348 | \$3,448 | \$3,551 | \$3,658 | \$3,768 | \$3,881 | \$3,997 | \$4,117 | \$4,241 |
| Gross Parking Revenue | \$20,250 | \$36,760 | \$40,846 | \$58,248 | \$79,749 | \$81,767 | \$82,870 | \$103,729 | \$104,665 | \$105,624 |
| Parking Expense (15%) | \$3,038 | \$5,514 | \$6,127 | \$8,737 | \$11,962 | \$12,265 | \$12,430 | \$15,559 | \$15,700 | \$15,844 |
| Net Parking Revenue | \$17,213 | \$31,246 | \$34,719 | \$49,510 | \$67,786 | \$69,502 | \$70,439 | \$88,169 | \$88,965 | \$89,781 |

Source: Hunden Strategic Partners

As shown, the parking revenue assumes a \$5 fee per car at each event. The parking revenue assumes a 15 percent expense for upkeep and parking operations. The net parking revenue is projected to increase from more than \$17,000 to nearly \$90,000 by the tenth year. High School events are expected to generate the most parking revenue at Settler's Hill.

The next table shows the rent detail for the Settler's Hill Cross-Country Course.

Table 7-10

| Projected Gross Rental Revenue by Category and Year | | | | | | | | | | |
|---|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| Category | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 | Year 6 | Year 7 | Year 8 | Year 9 | Year 10 |
| Existing Events | | | | | | | | | | |
| High School | \$3,605 | \$3,713 | \$3,825 | \$7,879 | \$8,115 | \$8,358 | \$8,609 | \$13,301 | \$13,700 | \$14,111 |
| IHSA Sectional | \$3,605 | \$7,426 | \$7,649 | \$7,879 | \$8,115 | \$8,358 | \$8,609 | \$8,867 | \$9,133 | \$9,407 |
| IHSA Regional | \$3,605 | \$7,426 | \$7,649 | \$7,879 | \$8,115 | \$8,358 | \$8,609 | \$8,867 | \$9,133 | \$9,407 |
| Collegiate | \$0 | \$0 | \$4,371 | \$4,502 | \$4,637 | \$4,776 | \$4,919 | \$5,067 | \$5,219 | \$5,376 |
| Community Runs | \$3,090 | \$3,183 | \$3,278 | \$3,377 | \$6,956 | \$7,164 | \$7,379 | \$7,601 | \$7,829 | \$8,063 |
| New Events | | | | | | | | | | |
| High School | \$0 | \$0 | \$3,825 | \$3,939 | \$4,057 | \$4,179 | \$4,305 | \$4,434 | \$4,567 | \$4,704 |
| Collegiate | \$0 | \$0 | \$0 | \$4,502 | \$4,637 | \$4,776 | \$4,919 | \$5,067 | \$5,219 | \$5,376 |
| Community Runs | \$3,090 | \$3,183 | \$3,278 | \$3,377 | \$3,478 | \$3,582 | \$3,690 | \$3,800 | \$3,914 | \$4,032 |
| Open | \$4,635 | \$4,774 | \$4,917 | \$5,065 | \$10,433 | \$10,746 | \$11,069 | \$11,401 | \$11,743 | \$12,095 |
| Youth | \$0 | \$0 | \$0 | \$0 | \$5,217 | \$5,373 | \$5,534 | \$5,700 | \$5,871 | \$6,048 |
| Master's | \$0 | \$0 | \$0 | \$0 | \$0 | \$5,373 | \$5,534 | \$5,700 | \$5,871 | \$6,048 |
| Other Low Impact Sporting Events | \$0 | \$0 | \$0 | \$5,065 | \$5,217 | \$5,373 | \$5,534 | \$5,700 | \$5,871 | \$6,048 |
| Non-Sporting Event | \$4,635 | \$4,774 | \$4,917 | \$5,065 | \$5,217 | \$5,373 | \$5,534 | \$5,700 | \$5,871 | \$6,048 |
| Total | \$26,265 | \$34,479 | \$43,709 | \$58,526 | \$74,194 | \$81,793 | \$84,246 | \$91,207 | \$93,944 | \$96,762 |

Source: Hunden Strategic Partners

In total, there are many factors that contribute to revenue and expense. In order for the Settler's Hill Cross-Country Course to break even or improve its cost recovery as an enterprise, an entrepreneurial and businesslike mindset will be necessary to promote and program the site with users and events during the eight programmable months of April through November.

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ECONOMIC, FISCAL & EMPLOYMENT IMPACT ANALYSIS

While many facilities that draw tourists and visitors only break even or even lose money from operations (such as convention centers, sports facilities, etc.), the impact of the visitors on the community can be significant. The impact from spending on hotels, restaurants, stores and gas stations can generate hundreds of jobs and large tax benefits from local use taxes.

While the gross operations of the Project will generate sales tax, the critical analysis is to determine the amount of net new spending generated by the Project and what that supports in net earnings, jobs and what it generates in net new taxes. In this chapter, the net new Settler's Hill Cross-Country Course impacts are assessed.

The basis for the impacts will be the net new room nights generated due to the Project as well as the incremental spending associated with existing visitors who spend more because of their visit to the Project. The net new visitors may be staying in other hotels as well, like sports teams that now are coming to Kane County because events can now happen as well as elsewhere that otherwise would not have occurred.

HSP modeled the Settler's Hill Cross-Country Course and based on the projection of the proforma, additional impact data was derived. The key components of visitation and spending are generated by overnight stays as well as day trips. Given the cost of having kids in travel-sports or in events, many will drive in and out the same day if possible, even if they need to drive an hour or more each way, multiple days.

HSP uses the IMPLAN input-output multiplier model, which determines the level of additional activity in the economy due to additional inputs. For example, for every dollar of direct new spending in Kane County, the IMPLAN model provides multipliers for the indirect and induced spending that will result.

Net New and Recaptured Room Nights and Room Revenue

The following table shows the number of room nights generated from each user group.

Table 8-1

| Projected Room Nights Generated - Settler's Hill Cross Country Course | | | | | | | | | | | | | |
|---|-------------|--------------|------------------|------------|------------|------------|------------|--------------|--------------|--------------|--------------|--------------|--------------|
| | % Overnight | People/ Room | Nights per Event | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 | Year 6 | Year 7 | Year 8 | Year 9 | Year 10 |
| Existing Events | | | | | | | | | | | | | |
| High School | 0% | 2.9 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| IHSA Sectional | 0% | 2.9 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| IHSA Regional | 0% | 2.9 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Collegiate | 10% | 2.9 | 1 | 0 | 0 | 36 | 37 | 37 | 38 | 38 | 38 | 39 | 39 |
| Community Runs | 2% | 2.3 | 1 | 13 | 13 | 14 | 14 | 29 | 30 | 31 | 32 | 33 | 34 |
| New Events | | | | | | | | | | | | | |
| High School | 0% | 2.9 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Collegiate | 20% | 2.1 | 1 | 0 | 0 | 0 | 102 | 103 | 104 | 105 | 106 | 107 | 108 |
| Community Runs | 2% | 2.3 | 1 | 10 | 11 | 11 | 11 | 12 | 12 | 12 | 13 | 13 | 14 |
| Open | 15% | 2.1 | 1 | 240 | 245 | 250 | 255 | 520 | 530 | 541 | 551 | 562 | 574 |
| Youth | 15% | 2.1 | 1 | 0 | 0 | 0 | 0 | 232 | 237 | 241 | 246 | 251 | 256 |
| Master's | 15% | 2.1 | 1 | 0 | 0 | 0 | 0 | 0 | 73 | 74 | 75 | 77 | 79 |
| Other Low Impact Sporting Events | 15% | 2.1 | 1 | 0 | 0 | 0 | 43 | 43 | 44 | 45 | 46 | 47 | 48 |
| Non-Sporting Event | 5% | 2.1 | 1 | 82 | 85 | 87 | 90 | 92 | 95 | 98 | 101 | 104 | 107 |
| Total | | | | 346 | 354 | 398 | 551 | 1,068 | 1,162 | 1,185 | 1,209 | 1,233 | 1,258 |
| | | | | 346 | 354 | 398 | 551 | 1,068 | 1,162 | 1,185 | 1,209 | 1,233 | 1,258 |

Source: Various Sports Organizations, Hunden Strategic Partners

As shown, there are projected to be more than 1,250 room nights generated by the tenth year. Most are assumed to be generated by open and youth meets. While not all will be captured in Kane County, many will and these will generate impact locally. The majority of visitation will be derived from local or drive-in visitors.

The next table shows the number of day trips generated by the Settler's Hill Cross-Country Course.

Table 8-2

| Projected Day Trips Generated - Settler's Hill Cross-Country Course | | | | | | | | | | | | |
|---|------------|----------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| | % Day Trip | Days per Event | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 | Year 6 | Year 7 | Year 8 | Year 9 | Year 10 |
| Existing Events | | | | | | | | | | | | |
| High School | 100% | 1 | 4,200 | 4,242 | 4,284 | 8,655 | 8,741 | 8,828 | 8,917 | 13,509 | 13,644 | 13,780 |
| IHSA Sectional | 100% | 1 | 2,520 | 5,040 | 5,040 | 5,040 | 5,040 | 5,040 | 5,040 | 5,040 | 5,040 | 5,040 |
| IHSA Regional | 100% | 1 | 1,125 | 2,250 | 2,250 | 2,250 | 2,250 | 2,250 | 2,250 | 2,250 | 2,250 | 2,250 |
| Collegiate | 90% | 1 | 0 | 0 | 950 | 960 | 969 | 979 | 989 | 999 | 1,009 | 1,019 |
| Community Runs | 98% | 1 | 1,470 | 1,514 | 1,560 | 1,606 | 3,309 | 3,408 | 3,511 | 3,616 | 3,724 | 3,836 |
| New Events | | | | | | | | | | | | |
| High School | 100% | 1 | 0 | 0 | 2,497 | 2,547 | 2,598 | 2,650 | 2,703 | 2,757 | 2,812 | 2,868 |
| Collegiate | 80% | 1 | 0 | 0 | 0 | 853 | 862 | 870 | 879 | 888 | 897 | 906 |
| Community Runs | 98% | 1 | 1,176 | 1,211 | 1,248 | 1,285 | 1,324 | 1,363 | 1,404 | 1,446 | 1,490 | 1,534 |
| Open | 85% | 1 | 2,856 | 2,913 | 2,971 | 3,031 | 6,183 | 6,307 | 6,433 | 6,561 | 6,693 | 6,826 |
| Youth | 85% | 1 | 0 | 0 | 0 | 0 | 2,760 | 2,815 | 2,872 | 2,929 | 2,988 | 3,047 |
| Master's | 85% | 1 | 0 | 0 | 0 | 0 | 0 | 863 | 881 | 898 | 916 | 935 |
| Other Low Impact Sporting Events | 85% | 1 | 0 | 0 | 0 | 507 | 518 | 528 | 538 | 549 | 560 | 571 |
| Non-Sporting Event | 95% | 1 | 3,278 | 3,376 | 3,477 | 3,581 | 3,689 | 3,800 | 3,914 | 4,031 | 4,152 | 4,276 |
| Total | | | 16,625 | 20,546 | 24,277 | 30,315 | 38,242 | 39,702 | 40,329 | 45,473 | 46,174 | 46,890 |
| | | | 16,625 | 20,546 | 24,277 | 30,315 | 38,242 | 39,702 | 40,329 | 45,473 | 46,174 | 46,890 |

Source: Various Sports Organizations, Hunden Strategic Partners

Nearly 47,000 visitor days are expected by the tenth year and approximately 79 percent are expected to be residents from the Kane County area, which are not included as new impact. However, there are expected to be nearly 10,000 non-local visitors day trips.

This section analyzes the economic, fiscal and employment benefits that would accrue to Kane County by the activities at the Settler's Hill Cross-Country Course. It also reviews the potential economic and fiscal impacts induced through the construction of the project.

HSP only counts net new spending to the community, not recycled spending by local users. The basis for counting spending is based on new overnight visitor days and new daytrip visitor days.

The assumptions for each type of spending create the total incremental spending associated with the Settler's Hill Cross-Country Course. The following table shows the net new visitor days and overnights as well as the resulting new hotel room nights, which serve as the basis for the impact model.

Table 8-3

| Net New Visitors and Room Nights | | | | | | | | | |
|----------------------------------|--------|--------|--------|--------|--------|---------|---------|---------|---------|
| | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 | Year 10 | Year 15 | Year 20 | Total |
| New Daytrip Visitor Days | 3,563 | 4,185 | 5,081 | 6,370 | 8,435 | 9,925 | 9,925 | 9,925 | 173,899 |
| New Overnight Visitor Days | 648 | 663 | 747 | 1,033 | 2,003 | 2,359 | 2,359 | 2,359 | 40,020 |
| New Hotel Room Nights (Local) | 259 | 265 | 299 | 413 | 801 | 943 | 943 | 943 | 16,008 |

Source: Hunden Strategic Partners

Over the next twenty-year period, nearly 174,000 new daytrip visitor days and more than 40,000 overnight visitor days are expected in the area. This should result in more than 16,000 new hotel room nights in the Kane County over the period. Approximately 75 percent of room nights generated are expected to be captured in Kane County.

Daily Spending

Attendees will spend on concessions as well as spend on restaurants in the area. Visitors will come to Settler's Hill and spend money onsite, but many locals and visitors will also spend new or increased funds at restaurants around the venue.

The daily spending by visitors and the overnight spending by overnight visitors all contribute to the economic impact of the Project. Data from spending at similar venues, data from hotel spending and other data was used to create conservative estimates of daily spending. Other spending includes entertainment and attractions, as well as other non-specified spending. These are shown in the next table.

Table 8-4

| Estimated Spending Per Visitor Per Day - Settler's Hill Cross-Country Course | | | | | | | | | | |
|--|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 | Year 6 | Year 7 | Year 8 | Year 9 | Year 10 |
| Spending per Visitor - Overnight | | | | | | | | | | |
| Onsite Food & Beverage | \$3.50 | \$3.61 | \$3.71 | \$3.82 | \$3.94 | \$4.06 | \$4.18 | \$4.30 | \$4.43 | \$4.57 |
| Offsite Food & Beverage | \$22.50 | \$23.18 | \$23.87 | \$24.59 | \$25.32 | \$26.08 | \$26.87 | \$27.67 | \$28.50 | \$29.36 |
| Total Food & Beverage | \$26.00 | \$26.78 | \$27.58 | \$28.41 | \$29.26 | \$30.14 | \$31.05 | \$31.98 | \$32.94 | \$33.92 |
| Lodging Spending | \$55.60 | \$57.27 | \$58.99 | \$60.76 | \$62.58 | \$64.46 | \$66.39 | \$68.38 | \$70.43 | \$72.55 |
| Retail Spending | \$4.75 | \$4.89 | \$5.04 | \$5.19 | \$5.35 | \$5.51 | \$5.67 | \$5.84 | \$6.02 | \$6.20 |
| Transportation Spending | \$8.14 | \$8.38 | \$8.64 | \$8.89 | \$9.16 | \$9.44 | \$9.72 | \$10.01 | \$10.31 | \$10.62 |
| Entertainment/Rec/Other | \$8.25 | \$8.50 | \$8.75 | \$9.01 | \$9.29 | \$9.56 | \$9.85 | \$10.15 | \$10.45 | \$10.76 |
| Total Direct Spending | \$102.74 | \$105.82 | \$109.00 | \$112.27 | \$115.63 | \$119.10 | \$122.68 | \$126.36 | \$130.15 | \$134.05 |
| Spending per Visitor - Daytrip | | | | | | | | | | |
| Onsite Food & Beverage | \$1.75 | \$1.80 | \$1.86 | \$1.91 | \$1.97 | \$2.03 | \$2.09 | \$2.15 | \$2.22 | \$2.28 |
| Offsite Food & Beverage | \$13.50 | \$13.91 | \$14.32 | \$14.75 | \$15.19 | \$15.65 | \$16.12 | \$16.60 | \$17.10 | \$17.61 |
| Total Food & Beverage | \$15.25 | \$15.71 | \$16.18 | \$16.66 | \$17.16 | \$17.68 | \$18.21 | \$18.76 | \$19.32 | \$19.90 |
| Retail Spending | \$2.38 | \$2.45 | \$2.52 | \$2.60 | \$2.67 | \$2.75 | \$2.84 | \$2.92 | \$3.01 | \$3.10 |
| Transportation Spending | \$2.85 | \$2.93 | \$3.02 | \$3.11 | \$3.21 | \$3.30 | \$3.40 | \$3.50 | \$3.61 | \$3.72 |
| Other Spending | \$4.13 | \$4.25 | \$4.38 | \$4.51 | \$4.64 | \$4.78 | \$4.93 | \$5.07 | \$5.23 | \$5.38 |
| Total Direct Spending | \$24.60 | \$25.34 | \$26.10 | \$26.88 | \$27.69 | \$28.52 | \$29.37 | \$30.25 | \$31.16 | \$32.10 |

Source: Hunden Strategic Partners

The per-person per-day spending for overnight guests total \$102.74 in Year 1 in the area, and increases with inflation. The daily spending per person for day trips is \$24.60 in the first year.

Economic, Earnings, Employment and Fiscal Impact

The net new and recaptured direct spending discussed earlier in the chapter is considered to be the **Direct Impact**.

From the direct spending figures, further impact analyses will be completed.

- **Direct impacts** - are an expression of the spending that occurs as a direct result of the events and activities that occur due to the sports complex. For example, a hotel guest's expenditures on hotel rooms and meals are a direct economic impact.
- **Indirect impacts** - consist of re-spending of the initial or direct expenditures, or, the supply of goods and services resulting from the initial direct spending due to Settler's Hill. For example, a guest's direct expenditure on a restaurant meal causes the restaurant to purchase food and other items from suppliers. The portion of these restaurant purchases that are within the local, regional, or state economies is counted as an indirect economic impact.
- **Induced impacts** – represent changes in local consumption due to the personal spending by employees whose incomes are affected by direct and indirect spending. For example, a waiter at the restaurant may have more personal income as a result of the guest's visit. The amount of the increased income the waiter spends in the local economy is considered an induced impact.

- **Personal income** – measures increased employee and worker compensation related to the hotel operations being analyzed. This figure represents increased payroll expenditures, including benefits paid to workers locally. It also expresses how the employees of local businesses share in the increased outputs.
- **Employment impact** – measures the number of jobs supported in the study area related to the spending generated as a result of the events occurring at Settler's Hill. Employment impact is stated in job-years.

The total impacts of the proposed project in Kane County presented in this analysis are expressed through the net new spending to Kane County. The direct spending is broken down into food and beverage, lodging, retail, transportation and other spending. Spending assumptions are assigned per day per person for either a day trip or an overnight.

Direct, Indirect and Induced Impacts

The table below shows the direct net new spending, based on the analysis.

Table 8-5

| Direct Net New Spending (000s) | | | | | | | | | |
|--------------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|-----------------|
| | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 | Year 10 | Year 15 | Year 20 | Total |
| Food & Beverage | \$71 | \$83 | \$103 | \$136 | \$203 | \$277 | \$322 | \$373 | \$5,121 |
| Lodging | \$36 | \$39 | \$46 | \$66 | \$129 | \$180 | \$212 | \$249 | \$3,294 |
| Retail | \$12 | \$13 | \$17 | \$22 | \$33 | \$45 | \$53 | \$61 | \$837 |
| Transportation | \$15 | \$18 | \$22 | \$29 | \$45 | \$62 | \$72 | \$83 | \$1,140 |
| Other | \$20 | \$23 | \$29 | \$38 | \$58 | \$79 | \$91 | \$106 | \$1,453 |
| Total | \$154 | \$177 | \$216 | \$290 | \$469 | \$644 | \$750 | \$872 | \$11,844 |

Source: Hunden Strategic Partners

Most spending occurs at restaurants and hotels. Over the twenty-year period, approximately \$5.1 million is expected to be spent on food and beverage by net new visitation and \$3.3 million from hotel spending. Transportation and retail spending will also be impacted locally, with approximately \$1.1 million and \$837,000 additional spent over the period, respectively. Other spending on visitation to other attractions and other spending is projected to total \$1.6 million over 20 years.

The following table shows the spinoff impact economic spending and activity in the market from the direct spending, as described in the definitions earlier in the chapter.

Table 8-6

| Direct, Indirect & Induced Net New Spending (000s) | | | | | | | | | |
|--|--------------|--------------|--------------|--------------|--------------|----------------|----------------|----------------|------------------------|
| | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 | Year 10 | Year 15 | Year 20 | Total |
| Net New Spending | | | | | | | | | |
| Direct | \$154 | \$177 | \$216 | \$290 | \$469 | \$644 | \$750 | \$872 | \$11,844 |
| Indirect | \$42 | \$48 | \$59 | \$79 | \$127 | \$174 | \$203 | \$236 | \$3,210 |
| Induced | \$50 | \$57 | \$70 | \$93 | \$149 | \$204 | \$237 | \$276 | \$3,753 |
| <i>Total</i> | <i>\$246</i> | <i>\$282</i> | <i>\$344</i> | <i>\$462</i> | <i>\$745</i> | <i>\$1,022</i> | <i>\$1,190</i> | <i>\$1,384</i> | <i>\$18,807</i> |

Source: Hunden Strategic Partners

Direct spending, as shown previously, is projected to total approximately \$11.8 million over the period, while indirect and induced spending will add \$3.2 million and \$3.8 million over the period. Total net new spending will range from \$246,000 in Year 1 and increase to \$1.4 million by the twentieth year, totaling more than \$18.8 million over the period.

The following table shows the net new earnings derived from the new spending. Earnings are the portion of new spending that ends up as wages for employees in businesses in Kane County.

Table 8-7

| Net New Earnings from Direct, Indirect & Induced Spending (000s) | | | | | | | | | |
|--|-------------|-------------|-------------|--------------|--------------|--------------|--------------|--------------|-----------------------|
| | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 | Year 10 | Year 15 | Year 20 | Total |
| Net New Earnings | | | | | | | | | |
| From Direct | \$60 | \$69 | \$85 | \$113 | \$179 | \$246 | \$286 | \$332 | \$4,521 |
| From Indirect | \$4 | \$4 | \$5 | \$7 | \$11 | \$15 | \$17 | \$20 | \$273 |
| From Induced | \$5 | \$6 | \$7 | \$10 | \$15 | \$21 | \$24 | \$28 | \$380 |
| <i>Total</i> | <i>\$69</i> | <i>\$79</i> | <i>\$97</i> | <i>\$129</i> | <i>\$205</i> | <i>\$281</i> | <i>\$327</i> | <i>\$380</i> | <i>\$5,173</i> |

Source: Hunden Strategic Partners

New earnings in the area from the new spending will total \$69,000 in the first year, increasing to approximately 380,000 by the end of the period. Throughout the period \$5.2 million in new earnings will be new due to the Settler's Hill Cross-Country Course.

The next table shows the net new full-time equivalent jobs supported by the new spending. These new positions will be supported throughout the economy, not just in visitor-related jobs, although these will be most likely.

Table 8-8

| Net New Full-Time Equivalent Jobs from Direct, Indirect & Induced Earnings (000s) | | | | | | | | |
|---|----------|----------|----------|----------|-----------|-----------|-----------|-----------|
| | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 | Year 10 | Year 15 | Year 20 |
| Net New FTE Jobs | | | | | | | | |
| From Direct | 3 | 3 | 4 | 5 | 9 | 10 | 10 | 10 |
| From Indirect | 0 | 0 | 0 | 0 | 0 | 1 | 1 | 1 |
| From Induced | 0 | 1 | 1 | 1 | 2 | 3 | 3 | 3 |
| <i>Total</i> | <i>3</i> | <i>4</i> | <i>5</i> | <i>7</i> | <i>11</i> | <i>13</i> | <i>13</i> | <i>13</i> |

Source: Hunden Strategic Partners

In the stabilized year, an additional 13 full-time equivalent jobs will be created and supported in the local economy by the direct, indirect and induced spending in the economy that will be new due to the hundreds of thousands of new attendees.

Fiscal Impact Analysis

Fiscal impacts are tax revenues that result from the spending and income related to the activities at the Settler's Hill Cross-Country Course. However, Kane County does not levy any material taxes that would support assumptions for sound fiscal impacts. To the extent the municipalities within Kane County are a home rule unit, the municipalities would be positively impacted. Home rule municipalities may levy additional tax upon all persons who are in the business of selling tangible personal property at retail in their jurisdiction.

Construction Impact

In addition to the ongoing impacts from the operation of the facilities, the construction of the Settler's Hill Cross-Country Course would create a one-time influx of spending. The construction spending also results in employment in many sectors of the local economy.

A ratio of 60 percent labor, 40 percent materials is used to determine the spending and employment and income impacts. Labor costs will generate direct labor impacts and materials will generate other new income in the area. Approximately 60 percent of construction materials and labor are expected to be purchased locally.

The following table shows the total direct spending and the estimated indirect and induced impacts that the construction of the development would generate to the local economy.

Table 8-9

| Construction Impact - Settler's Hill Cross-Country Course | |
|--|---------------|
| | Impact |
| Direct Materials Spending - Local | \$932,000 |
| Indirect Spending - Local | \$253,247 |
| Induced Spending - Local | \$320,400 |
| Total | \$1,505,647 |
| Direct Labor Spending | \$1,398,000 |
| Employment (Job Years) | 7 |
| Source: Hunden Strategic Partners | |

Based on an estimated \$3.88 million development cost, the construction activity from the Settler's Hill Cross-Country Course is expected to generate \$932,000 in direct economic spending from materials spending and \$1.4 million in local labor spending. This will support seven job-years, or essentially seven jobs for a one-year period.

Summary of Impacts

The table below shows the summary of impacts from new spending and visits to Kane County.

Table 8-10

| Summary of Impacts | | |
|-----------------------------------|-------------------|------------------------|
| | 20-Years | Stabilized Year |
| Net New Spending | (millions) | |
| Direct | \$11.8 | \$0.58 |
| Indirect | \$3.2 | \$0.16 |
| Induced | \$3.8 | \$0.18 |
| Total | \$18.8 | \$0.93 |
| Net New Earnings | (millions) | |
| From Direct | \$4.5 | \$0.22 |
| From Indirect | \$0.3 | \$0.01 |
| From Induced | \$0.4 | \$0.02 |
| Total | \$5.2 | \$0.25 |
| Net New FTE Jobs | Actual | |
| From Direct | 10 | 10 |
| From Indirect | 1 | 1 |
| From Induced | 3 | 2 |
| Total | 13 | 13 |
| Construction Impact | (000s) | |
| Total Spending | \$1,506 | |
| Direct Labor Spending | \$1,398 | |
| Job-Years, Actual | 7 | |
| Source: Hunden Strategic Partners | | |

In total, the Settler's Hill Cross-Country Course is estimated to generate nearly \$18.8 million in total spending over 20 years. New earnings are projected to total \$5.2 million over the period, supporting 13 full-time equivalent positions during that time. The construction impact totals more than \$1.5 million in impact from materials spending locally and more than \$1.4 million in spending from earnings as well as seven construction job-years.