

**CITY OF DELAWARE  
FINANCE COMMITTEE  
CITY COUNCIL CHAMBERS  
1 SOUTH SANDUSKY STREET  
3:00 P.M.**

**AGENDA**

April 25, 2018

1. Roll Call
2. Approval of the Motion Summary for the meeting held February 28, 2018, as recorded and transcribed.
3. Oak Grove Cemetery Master Plan Update, MSP Design
4. Developer request to form a New Community Authority for the Terra Alta and Stockdale Farms developments. David Fisher, Principal, Kephart Fisher, LLC.
5. City Hall Annex – Review of Plan and Estimated Costs
6. Updates:
  - a. 2019-2023 Capital Improvement Plan
  - b. Impact Fees
  - c. Engineering Fees/Cost Tracking
7. Member Comments
8. Adjournment

**FINANCE COMMITTEE  
MOTION SUMMARY  
February 28, 2018**

ITEM 1. Roll Call

The Clerk called the Finance Committee meeting to order at 4:05 p.m.

Members Present: Councilmember Chris Jones, Councilman George Hellinger and Vice-Mayor Kent Shafer

Staff Present: Dean Stelzer, Finance Director, and Tom Homan, City Manager

ITEM 2. Election of Chair and Vice-Chair

**Motion:** Mr. Jones moved to nominate Mr. Hellinger as Chair, seconded by Vice-Mayor Shafer. There were no other nominations. Motion approved by a 3-0 vote.

**Motion:** Vice-Mayor Shafer moved to nominate Mr. Jones as Vice-Chair, seconded by Chairman Hellinger. There were no other nominations. Motion approved by a 3-0 vote.

ITEM 3. Approval of the Motion Summary for the meeting held August 16, 2017 as recorded and transcribed.

**Motion:** Vice-Mayor Shafer moved to approve the Motion Summary from August 16, 2017, seconded by Vice-Chairman Jones. Motion approved by a 3-0 vote.

ITEM 4. Review/Recommendation on Impact Fee Report

Mr. Homan reviewed the discussed at the recent City Council Retreat on what impact fees are used for and policy for. He discussed the complexity of the Transportation Impact Fees. He discussed that current Impact Fees have not changed in over ten years. A discussion was held on getting public involvement and starting the process. Mr. Stelzer recommended that Council review Chapter 1363 of the Codified Ordinances regarding procedures for Impact Fees and how the funds can be used.

ITEM 5. Enterprise Resource Planning Software Update

Mr. Stelzer discussed the plans to need to update software and the need to understand the business process for departments and to find a program that meets the needs.

ITEM 6. Financing Residential Infrastructure Costs – New Community Authorities

A discussion was held on the implementation of forming a NCA for the purpose of public goods and the funds for the construction of Glenn Parkway. A discussion was held on the developers looking at using NCA to fund development enhancements and assist with the cost of lowering the development. The Committee recommends that funding for development enhancements not be through a NCA, but more like a fee applied by the Home Owners Association.

ITEM 7. Member Comments

Mr. Stelzer discussed the Cemetery Master Plan.

Item 8. Schedule Meeting Dates for 2018

Meeting dates were scheduled for April 25, 2018 at 3:00 p.m. and July 11, 2018 at 3:00 p.m.

ITEM 9. **Executive Session:** Pursuant to Ohio Revised Code Section 121.22 (G) (3) pending or imminent court action, Section 121.22 (G) (1) personnel, Section 121.22 (G) (5) matters required to be kept confidential by State statute, Section 121.22 (G) (2) acquisition of property for public purpose and 121.22(G) (8) consideration of confidential information related to a request for economic development assistance.

Executive Session deemed no necessary.

ITEM 10. Adjournment

**Motion:** Vice-Chairman Jones moved to adjourn the Finance Committee meeting. The Finance Committee meeting adjourned at 5:05 p.m.

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Chairman

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Elaine McCloskey, Clerk

December 20, 2017

**Preliminary Schedule/Agenda Items – Oak Grove Cemetery**

Site Reconnaissance – January/February

- Site Analysis
- Prepare graphics
- Review/update Graphics
- Assess region's cemetery needs
- Lifespan of current cemetery space
- Future Demands

Key Stakeholder Meeting/Discovery Session/Charette – February

- Site Visit
- Discovery Session/Charette
- Review interment/memorial options
- Review expansion options
- Vehicular/Pedestrian circulation
- Security/Maintenance
- Service Area/Screening
- Cemetery house/office options
- Site Furnishings
- Landscaping
- Lighting
- Marketing/advertising options
- Best Practices recommendations
- Discuss Alternative Services

Community Design Meeting/Charette – February/March

- Prepare data from Site Reconnaissance and Design Meeting
- Present to community
- Charette/Obtain community feedback

Design Alternatives – March/April

- Prepare conceptual designs
- Review with Key Stakeholders
- Revise concept
- Present to Key Stakeholders
- Discuss Update on Alternative Services

Community Presentation – May

- Present to City Council/Public

Finalize Master Plan – May/June

- Update Master Plan based on City Council Comments

Present Final Master Plan – July

- Present Final Master Plan
- Discuss Cemetery Rules/Regulation Development
- Pricing and Product Mix
- Sales Contract Development
- Review new operating procedures and guidelines

TASK	2018						
	January	February	March	April	May	June	July
Task 1 – Site Reconnaissance	○						
Task 2 – Key Stakeholder Meeting/Charette	○	△					
Task 3 – Community Design Meeting/Charette		○	□				
Task 4 – Design Alternatives			○	△			
Task 5 – Community Presentation					□		
Task 6 – Finalize Master Plan					○	○	
Task 7 – Present Final Master Plan							△
○	MSP Design Team Task						
△	MSP and Client Task						
□	Public Participation Task						

DRAFT



1.800.952.0078  
info@greverandward.com

**ICCFA Magazine  
author spotlight**

► Ward is a registered landscape architect and president of Grever & Ward, an Orchard Park, New York, firm specializing exclusively in

cemetery design, planning and layout. He has more than 30 years of experience in cemetery-specific planning.

► Grever & Ward has continuously served the cemetery industry since 1939. Each year, they plan 50-75 new cemetery projects and have served more than 4,000 cemeteries throughout the US and Canada. The staff of six is experienced in cemetery master planning, detailed site design, field layout and mapping.

[www.greverandward.com](http://www.greverandward.com)

**CEMETERY DESIGN**

There's so much work involved in running a cemetery on a day-to-day basis, it can be hard to find the time for long-range planning, but it's something you need to do. Here's how to get started.

# How (& why) to get started on a master plan for your cemetery

**M**aster planning, by nature, is a rainy day project. Few argue its importance, but most cemeticians are more consumed by daily operations. Planning is most often done only as needed and to maintain adequate sales inventory. Except in the case of a brand new cemetery, master planning usually falls in the category of "it's the right thing to do" but is not high on anyone's actual to-do list.

The cost of not having a comprehensive plan, however, is paid through lost opportunities and inefficiencies. The resulting losses, financial and other, are very real, even if not always obvious on a day-to-day basis.

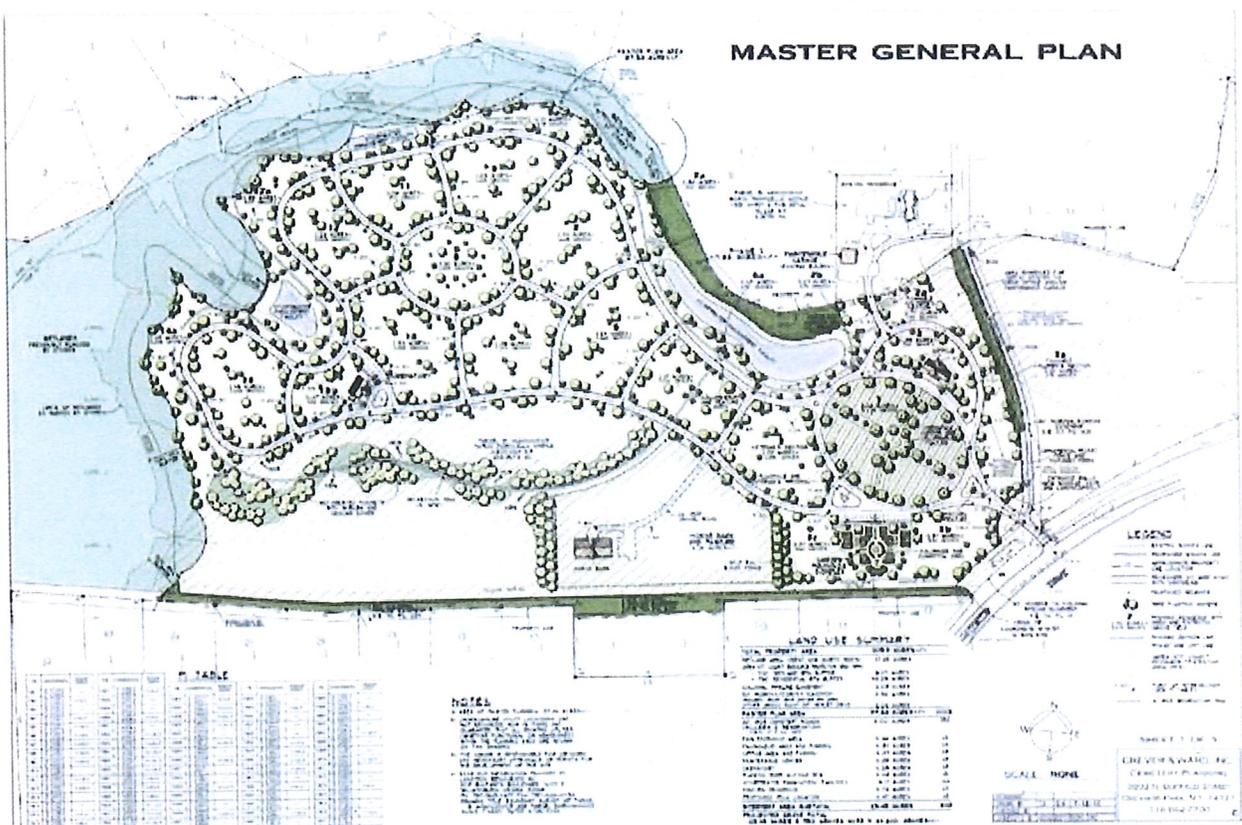
**Getting started**

As with any larger project, the most difficult part of a master plan is just getting it started. When we have a new request for a cemetery master plan, the first question is often "what kind of master plan?" Although each office has its own way of approaching master plans, the great variety in sites, situations and, especially, the cemetery's expectations alters those standard approaches.

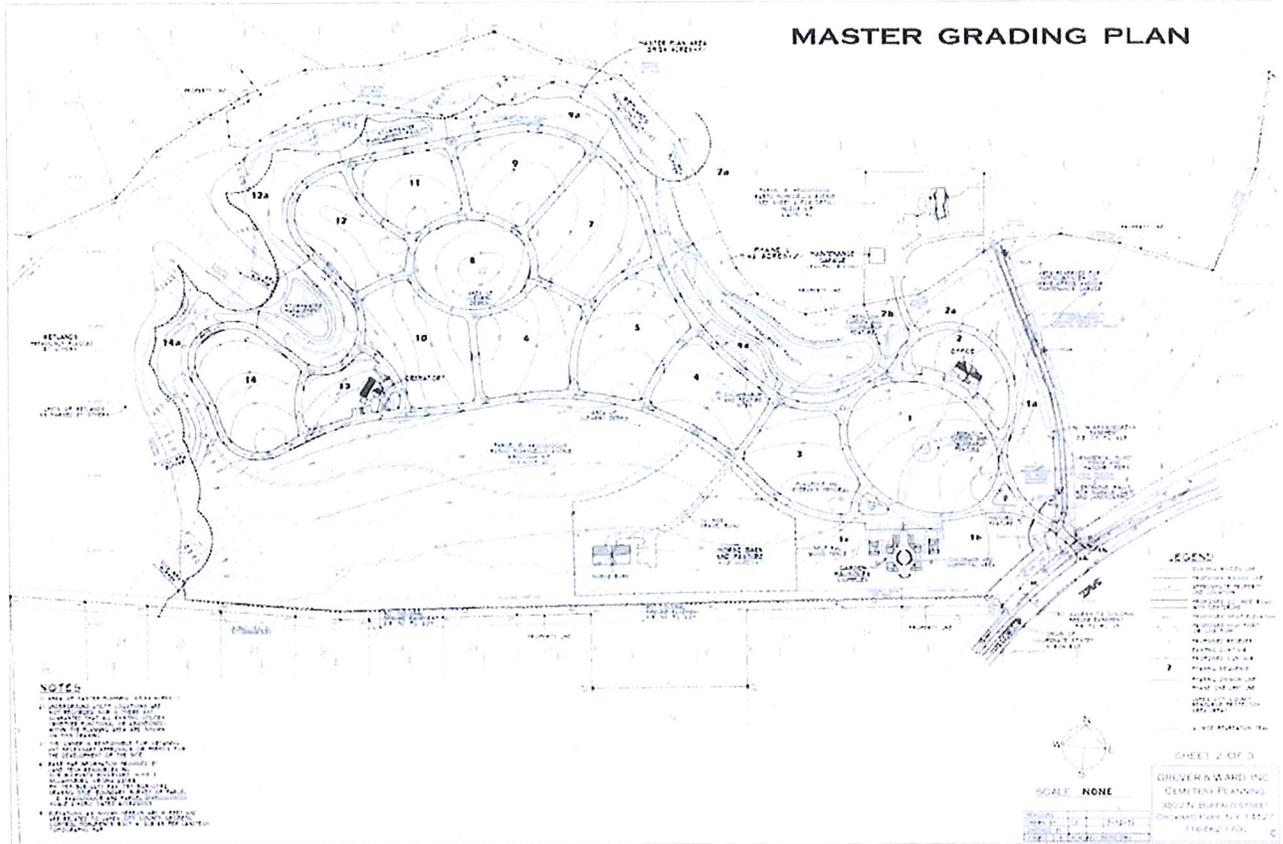
A master plan for a cemetery can cover a site varying in size from more than 100 acres down to less than 5 acres. The only common thread is the need to program the best way to use that undeveloped land.

For larger sites, often new cemeteries,

A cemetery master general plan by Grever & Ward covering a site of just under 40 acres shows areas for stormwater management, sites for a crematory, office, columbarium, cremation garden, veterans memorial and garden mausoleum and how the road system would divide the property into burial sections.



The master grading plan (right) and master drainage and water supply plan (below) for the same property shown in the master plan on page 30 provide a comprehensive look at those specific facets of the overall plan.



the emphasis is primarily on physical site development. Master plans for small sites tend to involve guidance in programming specific products in response to a known or anticipated market. Intermediate-sized master plans may address both.

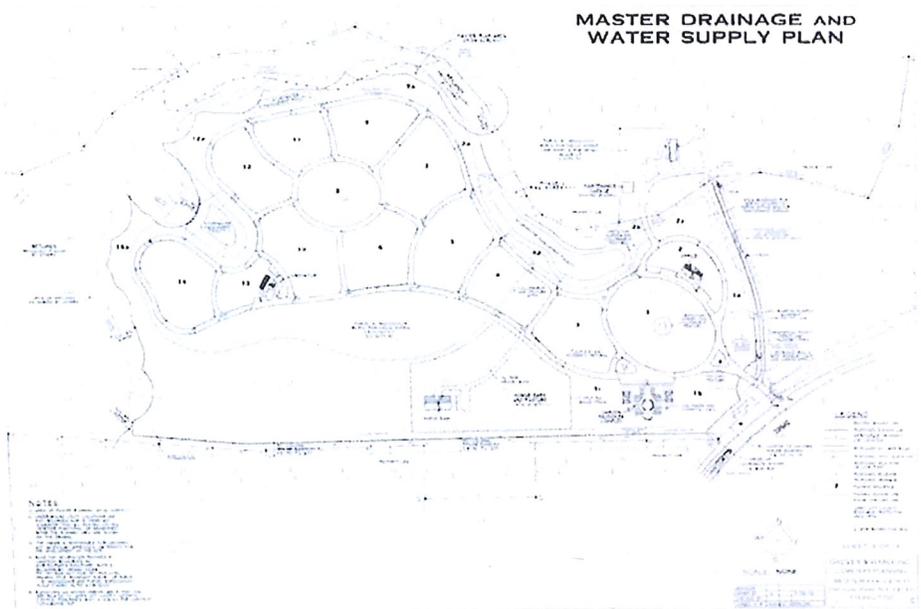
To get started with a master plan, cemetery managers should be aware of a few realities:

- A master plan is valuable when dealing with any stage of property life—a totally new cemetery, one halfway through its usable land or one with very little land left.

- To remain valid over time, a master plan must be grounded on basic physical relationships—topography, drainage patterns, soils, physical access and aesthetics, to name a few.

- A master plan is intended to be an evolving living document that responds to changing markets and priorities.

- Master plans usually have multiple audiences. They are the most public planning document for a cemetery. They may be used for communicating your vision to regulatory agencies, municipalities, the surrounding community and the public, via marketing. These uses are in addition to the core purpose



of setting goals for the cemetery and maintaining those goals through the years and through future administrations.

**What a master plan is and does**

Two of the more common misunderstandings about the purpose of a master plan are that they are used directly for construction or that they depict every future interment site for the property

covered by the plan.

A master plan that is physically well grounded provides an excellent framework for individual expansions and construction, but the level of detail is not sufficient for getting permits and approvals, or for communicating clearly to site contractors.

With that said, one area of beneficial overlap between master plans and site development plans is the ability to set

Without a master plan, cemeteries usually develop in small, tentative “add-ons” without long-range vision or the benefit of knowledgeable, professional cemetery design.

Planning fees may be avoided and the construction projects may be smaller, but true long-term savings, efficiencies and opportunities are lost.

More dramatically, we have seen situations where a cemetery has cut off access to a section of land by adding burial spaces that block future road routes.

phased project limits, quantify construction items and prepare preliminary cost estimates for the next expansion.

This gives cemetery leadership a reliable prediction of where the next development should occur, what it will cost and what it will produce in terms of interment space. The same qualities that enable this prediction also result in more seamless and less expensive future expansions.

Without a master plan, cemeteries usually develop in small, tentative “add-ons” without long-range vision or the benefit of knowledgeable, professional cemetery design. Planning fees may be avoided and the construction projects may be smaller, but true long-term savings, efficiencies and opportunities are lost. More dramatically, we have seen situations where a cemetery has cut off access to a section of land by adding burial spaces that block future road routes.

The physical format of a cemetery master plan will vary, based on the planning office’s preferences, the size and type of planning site and the specific needs and objectives of the cemetery.

On larger sites, new cemeteries or those with larger land reserves, a common format used in our office includes a number of interrelated studies and plan sheets that may include the following comprehensive studies:

- General plans, providing the layout of roads, entrances, building locations, special area features, development phases with projected interment sites and “macro” landscaping (tree patterns, buffers, etc.).
- Grading plans, proposing finished future contouring that will promote attractive, elevated sections, good operating slopes for equipment, positive stormwater runoff and accommodation of ongoing grave excavation and soil disposal.
- Drainage and utility plans, addressing needs for stormwater collection/detention, subsurface drainage of soils (perforated

subdrains) where necessary and water supply or any other utility needed to serve the property now and in the future. Details of these drainage and utility features are limited to only what is needed to assure function and avoid expensive upgrades in the future due to undersizing.

- Plan report and cost opinions, justifying and explaining design decisions and narrating any future considerations or issues that cannot be easily expressed on the plans.

Master plans, again, are meant to be flexible and revisable, but changes should not be made arbitrarily. Future administrators need to fully understand the rationale that shaped the original document before deciding that those factors have changed or that revisions are warranted.

Cost opinions for site development are extremely valuable for fixing construction budgets and helping cemeteries set product prices that are reality-based.

### The basic beginning steps

The idea of initiating development of a cemetery master plan can seem daunting and intimidating, but it shouldn’t be. Three basic steps are usually required of the cemetery. They are:

1. **Select a planning firm** based on cemetery experience and knowledge. Local planning offices often will have an important role in the cemetery’s development, especially as an interface with the local permitting and approval process in the middle part of the development process. Most such local firms, however, have very limited, if any, cemetery-specific experience.

In the early (master plan) stages and the later (interment space planning) stages, intimate knowledge of how cemeteries operate day-to-day and of current general cemetery trends and markets are essential.

The role of local professionals—addressing local or regional requirements—typically occurs in the mid-stages of the development process. It is crucial,

however, that they collaborate with the cemetery specialists along the way. Traditional approaches to planning don’t always translate well to cemeteries.

2. **Obtain accurate up-to-date site information**, with the assistance of the planner. Typical needs are for the cemetery’s boundary (property line) mapping, existing terrain and limits of development (topographic mapping) and any easements, rights-of-way or other land use restrictions, including zoning requirements. Soils information is critical, but it can be gathered later, during the early planning process.

3. **Prepare a list of needs**, including:

- a. A list of specific, ongoing issues, problems and limitations that the cemetery may be struggling with. For example, relationships with neighboring properties and the community.
- b. A profile of sales, ideally going back five years or more, should be compiled.
- c. A wish list of new products that haven’t been offered previously but may be needed in the future. Ideas can come from requests made by families, products seen in industry publications or at trade shows and offerings by competitors.
- d. A vision of where the cemetery needs to go, in terms of property identity and image. In many cases, this is simply a return to the cemetery’s founding concept.

With these basics, a master planning effort can begin. It is a process that never completely ends or stagnates. Periodic revisiting of the master plan every five to 10 years (or sooner, if conditions change) will keep it relevant. Those updates are typically minor compared to the original planning effort.

Developing a master plan can seem like an imposing task, but the first steps in the effort don’t need to be. In the end, your master plan will be tailored to the cemetery’s needs and your vision. The result will help the cemetery’s managers face the future with assurance and a new sense of direction. □

PROPOSAL FOR  
PROFESSIONAL DESIGN SERVICES

# CITY OF DELAWARE, OHIO

## Oak Grove Cemetery Master Plan

September 6, 2017

CREATING YOUR VISION



[www.mcgillsmithpunshon.com](http://www.mcgillsmithpunshon.com)

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# Cover Letter



September 6, 2017

**Jacqueline M. Walker**, *Assistant City Manager*  
City of Delaware  
City Hall  
One South Sandusky Street  
Delaware, Ohio 43015

**Re: Proposal for Professional Design Services, Oak Grove Cemetery Master Plan**

Dear Ms. Walker:

We appreciate your invitation to submit a proposal for the Oak Grove Cemetery Master Plan project. Based on your requirements set forth in the RFP, we have updated our materials and included a lump sum fee proposal. Please let us know if you need any additional information or have any questions.

Thank you for your consideration and we look forward to working with you!

Sincerely,

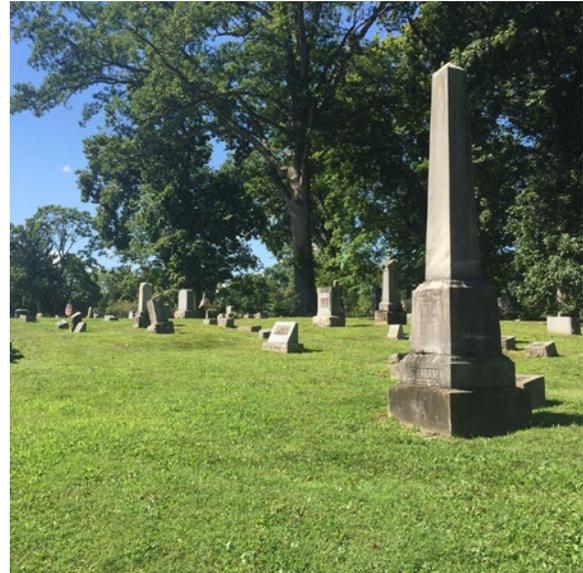
McGill Smith Punshon, Inc.

A handwritten signature in black ink, appearing to read 'Jose J. Castrejon', with a long, sweeping horizontal stroke extending to the right.

Jose J. Castrejon, ASLA, LEED AP  
*Vice President, Landscape Architecture and Planning*

## **1. Professional Landscape Architects, Architectural and Engineering Experience:**

MSP's commitment to quality has been the cornerstone of past and is the foundation for our future. MSP is a multi-disciplinary design firm composed of experienced architects, engineers, landscape architects, planners, and surveyors. This holistic approach of collaboration between these design disciplines has served our cemetery clients well since 1856 and has given MSP an impressive level of success!



In 1856 our founder laid the groundwork for the nation's second largest cemetery, Spring Grove Cemetery and Arboretum in Cincinnati Ohio. We are proud to continue that legacy today. Spring Grove continues to utilize a variety of our services.

Today, MSP continues to provide design services to the cemetery industry including: master planning, landscape architecture, engineering, surveying, and architecture. In addition, our design professionals have provided programming, planning cost estimating, construction administration and 3D graphic renderings services to many cemeteries.

## **2. Understanding of the overall purpose and context of the Oak Grove Cemetery Master Plan**

We feel that our design team is the best choice to assist the city of Delaware in providing guidance for Oak Grove Cemetery based on our success in developing master plans that have been implemented. Our goal is to give the City and cemetery an "Action Plan" for the future.

We have been successful in many cemetery projects utilizing an interactive planning approach. We realize that the quality of the plan and the resulting facilities are only as good as the quality of input and involvement from the client.



Even though we have an unparalleled history of cemetery design, we continue to learn and educate our design professionals to stay in the forefront of cemetery design. As you can see on the information included about our past project experience, we have successfully planned, and implemented many similar projects.

We realize as design professional, we need a team of expert to provide our clients a comprehensive solution during the master planning process. As part of our design team we have included Shanteau Consulting Services. David Shanteau is a second-generation cemeterian with over 40 years of expertise in cemetery management and consulting. For 35 years, he served as the Executive Director and President of an 80 acre, not-for-profit cemetery in Southwestern Ohio, where he successfully managed all aspects of administrative operations, sales, grounds maintenance and the planning and growth of the property.



As a cemetery consultant, David has provided his knowledge and passion about cemetery management and preservation to numerous independent, municipal, and township-owned cemeteries in the Midwest and Northeastern states. David has extensive experience in cemetery marketing and sales with specific skills in full site utilization including first, second and third interment right sales. He also has assisted several municipal cemeteries in developing documents for rules and regulations and maintenance policies.

### ***3. Innovation in emerging burial and management practices of cemeteries***

As demographics evolve we continue to refine our design approach to proven burial practices and continue to explore emerging trends that are sustainable.

Every Cemetery Master Plan should include not only multiple types of disposition but also the correct guidance to create a positive and sustainable direction regarding the public's perception of the Cemetery property and its staff. Our team has the expertise in directing our clients towards a result that not only satisfies the Cemetery's financial needs but also respectfully memorializes the thousands of deceased within its boundaries.

As cremation approaches 40 percent of all dispositions in the State of Ohio, our team can guide your cemetery towards a position of continued operations for generations to come.

Our design team also continues to stay in the forefront of cemetery design by speaking before numerous groups regarding evolving trends including sustainable design, green burial, cremation and the changing management practices of today's cemetery operations.



# Identification of Respondent



**McGill Smith Punshon, Inc. (MSP)** is a multi-discipline design firm composed of experienced architects, engineers, landscape architects, planners, and surveyors. Collaboration between these disciplines, along with a commitment to client communication and project planning, has given MSP an impressive level of success throughout over 150 years of history. MSP is a certified **Small Business Enterprise (SBE)**.

## Office Location

**ADDRESS** 3700 Park 42 Drive, Suite 190B  
Cincinnati, Ohio 45241  
**PHONE** 513.759.0004  
**FAX** 513.563.7099  
**WEB** [www.mspdesign.com](http://www.mspdesign.com)

## Primary Contact Person (*Project Manager*)

**Jose J. Castrejon**, ASLA, LEED AP  
*Vice President, Landscape Architecture & Planning*

**PHONE** 513.759.3224  
**EMAIL** [jcastrejon@mspdesign.com](mailto:jcastrejon@mspdesign.com)

## Company History

- 1856** The Thomas B. Punshon Engineering Company is founded as one of the original urban land planners in the Cincinnati region.
- 1956** McGill & Smith is founded, primarily focusing on public works and land development engineering.
- 1970s** McGill & Smith adds additional services in the fields of architecture, planning, and landscape architecture.
- 1984** The present organization of McGill Smith Punshon, Inc. (MSP) is formed through the merger of McGill & Smith, Inc. and the Thomas B. Punshon Engineering Company.
- Today** MSP is a diversified consulting firm providing architectural design, civil engineering, landscape architecture, planning, and surveying services to public, educational, private, institutional, and non-profit sectors.



1602 Greenwood Ave., Hamilton OH 45011 • 888-591-9002

## David Shanteau

David Shanteau is a second-generation cemeterian with over 40 years of expertise in cemetery management and consulting. For 35 years, he served as the Executive Director and President of an 80 acre, not-for-profit cemetery in Southwestern Ohio, where he successfully managed all aspects of administrative operations, sales, grounds maintenance and the planning and growth of the property.

David is a multiterm past President of the Ohio Association of Cemeteries and served for many years as the Chairman of the Ohio Cemetery Dispute Resolution Commission, the current governing entity for Ohio's Cemeteries. David was instrumental in the creation and implementation of much of Ohio's present Cemetery law.

As a cemetery consultant, David has provided his knowledge and passion about cemetery management and preservation to numerous independent, municipal, and township-owned cemeteries in the Midwest and Northeastern states. Recent assignments that David has been leading include the development of mausoleum, columbarium and cremation projects. David has spoken before numerous groups regarding evolving trends including green burial, cremation and the changing management practices of today's cemetery operations.

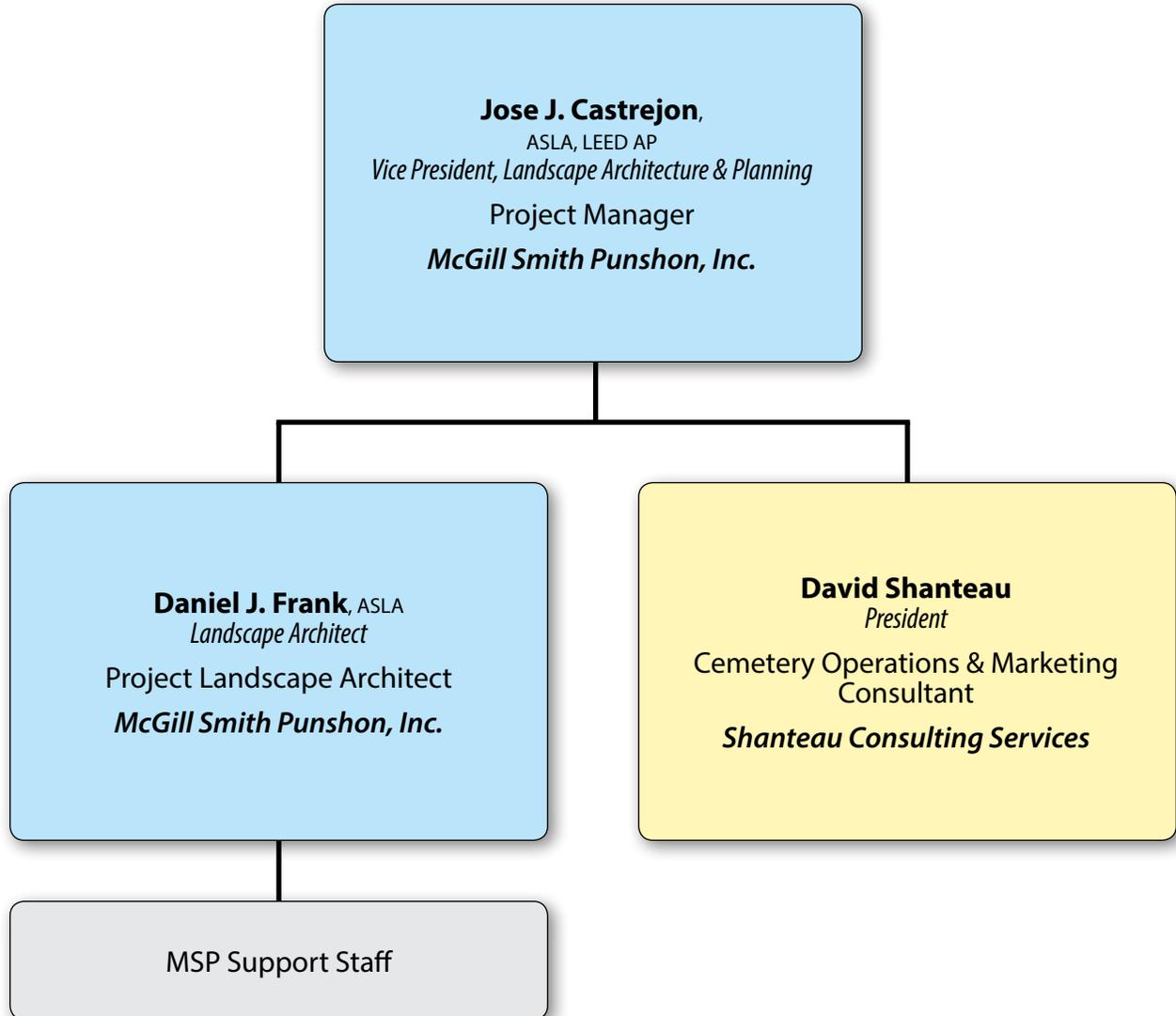
David has extensive experience in cemetery marketing and sales with specific skills in full site utilization including first, second and third interment right sales. As cremation approaches 40 percent of all dispositions in the State of Ohio, David's expertise has guided his cemetery clients towards a position of continued operations for generations to come.

Every Cemetery Master Plan should include not only multiple types of disposition but also the correct guidance to create a positive direction regarding the public's perception of the Cemetery property and its staff. David is an expert in directing his clients towards a result that not only satisfies the Cemetery's financial needs but also respectfully memorializes the thousands of deceased within its boundaries.

### *A Recent Testimonial*

*“With his broad knowledge of the financial and historical challenges facing the final resting places of so many of our ancestors, David Shanteau is well equipped to service the needs of cemeteries. He has the unique experience of having worked in every phase of cemetery operations. He has broad experience in management, planning, and in the creation of mausoleums and scattering gardens. He is also familiar with state cemetery statutes and procedures. But David brings something more—an historical perspective of the special place held by cemeteries, which not only carry many communities' link to the past, but also serve as repositories of family, state and national history.”*

*- D. Beran, Cemetery Trustee*





**Jose J. Castrejon**, ASLA, LEED AP  
Vice President, Landscape Architecture & Planning

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Jose is a landscape architect, planner, and facilitator with over 25 years of experience in the design and management of projects ranging from site-specific design to comprehensive master planning. His expertise includes municipal projects, urban design, and parks and recreation planning and design. His project approach emphasizes client collaboration and communication.

### **Project Experience**

- ▶ **Spring Grove Cemetery & Arboretum, Cincinnati, Ohio**  
For 160 years, MSP has worked with Spring Grove management updating the infrastructure of the site including access roads, facilities and burial options. MSP continues to encourage sustainable practices.
- ▶ **Lakeside Mausoleum Plaza, Spring Grove Cemetery, Cincinnati, Ohio**  
Project Manager for the design and construction documents of this one acre plaza/garden.
- ▶ **Rest Haven Memorial Park Cremation Garden, Blue Ash, Ohio**  
Project Manager for the design and construction document development for this two-acre cremation and scattering garden.
- ▶ **Green Lawn Abbey, Columbus, Ohio**  
Project Manager for the master planning of this unique stand-alone mausoleum. The Master Plan included development of a park-like setting with niche elements and scattering gardens.
- ▶ **Fairview Cemetery Master Plan, Bowling Green, Kentucky**  
Project Manager for the master plan of a 15-acre addition and design of a Veteran's plaza and cremation and scattering garden.
- ▶ **Forest Hill Union Cemetery Master Plan, Piqua, Ohio**  
Project Manager for the master planning of a 27-acre expansion to this historic cemetery. The Master Plan included a sustainable landscape strategy for tree replacement and new area plantings that encouraged native plant materials and sustainable irrigation practices.

### **AREAS OF EXPERTISE**

Municipal Projects  
Master Planning  
Site Planning & Design  
Sustainable Design

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### **EDUCATION**

Bachelor of Science,  
Landscape Architecture,  
The Ohio State University

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### **REGISTRATION**

Registered Landscape  
Architect in OH, KY, & SC

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### **CERTIFICATIONS**

LEED Accredited Professional

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### **PROFESSIONAL ACTIVITIES**

American Society of  
Landscape Architects (ASLA)

Ohio Parks and  
Recreation Association

Mill Creek Watershed  
Council

University of Cincinnati  
DAAP– Adjunct Instructor

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### **CONTACT**

[jcastrejon@mspd.com](mailto:jcastrejon@mspd.com)



**Daniel J. Frank**, ASLA  
Landscape Architect

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### AREAS OF EXPERTISE

Municipal Projects  
Site Planning and Design  
Streetscape Design  
Sustainable Design  
Construction Administration

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### EDUCATION

Bachelor of Science in  
Landscape Architecture,  
The Ohio State University

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### REGISTRATION

Registered Landscape  
Architect in OH & AZ

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### PROFESSIONAL ACTIVITIES

American Society of  
Landscape Architects (ASLA)  
  
Council of Landscape  
Architectural Registration  
Boards (CLARB)

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### CONTACT

[dfrank@mspd.com](mailto:dfrank@mspd.com)

Dan has over 25 years of experience in a wide variety of projects from the management level down to the installation of projects. His expertise includes site design, master planning and design, and single- and multi-family residential design and installation. Dan's approach is to provide a finished product that will enhance the environment, be functionally sound, and is the vision of the client.

### Project Experience

- ▶ **Greenlawn Cemetery**, *Columbus, Ohio*  
Provided landscape architectural services for a new office and mausoleum. Services included providing client with conceptual site plans for 2 different locations on the site which included vehicular access and parking, pedestrian connections between the office and mausoleum.
- ▶ **Spring Grove Cemetery & Arboretum**, *Cincinnati, Ohio*  
For 160 years, MSP has worked with Spring Grove management updating the infrastructure of the site including access roads, facilities and burial options. MSP continues to encourage sustainable practices.
- ▶ **Mt. St. Mary Seminary**, *Cincinnati, Ohio*  
Provided conceptual designs for various courtyards throughout the site which included hardscape and softscape amenities. Provided hardscape and landscape plans for the main entrance to the site as well as a landscape plan for the drop-off circle. Additional services included providing a tree replacement plan for the site.
- ▶ **Campus Landscape Improvements Master Plan & Implementation**, *Mount St. Joseph University, Cincinnati, Ohio*  
Project Designer, planning services to create a Landscape Master Plan, a comprehensive short and long term guide for the implementation, preservation, and enhancement of the overall campus landscape. The Master Plan includes various elements including pedestrian safety and traffic, pathways, pedestrian crossings, and vehicle and parking locations. MSP is currently implementing the Master Plan on multiple landscape improvement projects.

# David Shanteau

1602 Greenwood Ave ~ Hamilton, Ohio 45011 ~ (888) 591-9002

[dave@shanteauconsulting.com](mailto:dave@shanteauconsulting.com)

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## EXECUTIVE SUMMARY

2<sup>ND</sup> generation cemeterian including over 35 years of management experience in the administrative, maintenance and sales divisions of multiple not for profit cemeterys located in Southwestern Ohio. Direct involment in the creation of Ohio Cemetery standard operating procedures, Ohio Cemetery law and participation on multiple cemetery boards. Passionate about the quality and establishment of high standards for Ohio Cemeteries.

## CORE COMPETENCIES

Business Planning ~ Property Development ~ Sales & Marketing ~ Administration and Operations ~ Property Care and Maintenance ~ Mediation and resolution development

## PROFESSIONAL EXPERIENCE

### **Shanteau Consulting Services**

1974 - Present

*President and lead Consultant*

~ Informally consulted for independent Ohio Cemeteries ~ Designed, edited and managed creation of present Ohio Cemetery law ~ Chaired and retained membership of multiple Ohio Cemetery Boards and Commissions including the Ohio Cemetery Dispute Resolution Commission, Ohio Association of Cemeteries and Funeral Directors and Rest Haven Memorial Park ~ Founded and developed the Ohio Cemetery Foundation ~ Established Shanteau Consulting Services for the improvement of cemetery operations ~ Provides Professional Cemetery Consulting Services for numerous Midwest and Northeastern Cemeteries

### Rest Haven Memorial Park

1974 – 2009

*Executive Director and President*

~ Business Planning ~ Inventory analysis and projections ~ Pricing and product mix analysis ~ Mausoleum and Columbarium planning and financial models ~ Cash flow analysis ~ Personnel needs and compensation ~ Trust fund development planning ~ New cemetery sectional planning

### Property Development

~ Cemetery section and burial lot design ~ Cemetery space numbering plan ~ Cemetery section feature design and layout ~ Tree and bench placement within cemetery section ~ Cremation garden and design

### Sales & Marketing

~ Product development and pricing ~ Marketing strategies ~ Sales programming and terms of sale ~ Sales contract development ~ Cemetery sales brochure layout and design ~ Sales database development ~ Personnel needs and job descriptions

### Administration and Operations

~ Automation and computerization ~ Office operations and procedures manuals ~ Personnel needs and job descriptions ~ Cemetery mapping and inventory control ~ Accounting Analysis ~ Consumer relations ~ Cemetery Rules and regulations development ~ Overall administration and operational reviews ~ Cemetery Trustee and board planning

### Property Care and Maintenance

~ Equipment selection ~ Equipment operation and maintenance ~ Property care and maintenance ~ Flower bed design ~ Shrubbery and tree selection ~ Memorial and monument selection and layout ~ Personnel needs and job descriptions

## Firm Experience

### Dayton Memorial Park Cemetery

Dayton, Ohio



MSP's landscape architecture and planning department prepared a master plan for the development of Dayton Memorial Park Cemetery's open land. Elements of the master plan included providing a new veterans' memorial, as well as creating a variety of interment options such as columbariums, natural woodland and meadow burials, and cremation scattering gardens.

In addition, new amenities were included, such as a trellis structure, outdoor terrace, natural pond walkways, and accessible mausoleum access.

The objective of the design was to incorporate desirable characteristics from the historic area and provide amenities, while allowing room for growth necessary for future generations.



### SERVICES PROVIDED

Master Planning

### REFERENCE

**Mark Davis**, *General Manager*

Dayton Memorial Park

Cemetery

937.890.1831

mdavis@

daytonmemorialpark.com

### WEBSITE

[www.daytonmempark.com](http://www.daytonmempark.com)

**Spring Grove Cemetery & Arboretum**  
Cincinnati, Ohio



MSP continues its century-long relationship with Spring Grove Cemetery and Arboretum, providing comprehensive master planning, landscape architecture, civil engineering, and surveying services.

For 160 years, MSP has worked with Spring Grove management updating the infrastructure of the site including access roads, facilities and burial options.

Recently, MSP facilitated a master planning process, organized methods to gain input from the participants and enhance the value of their collective knowledge, coordinated the visioning process, and brought the committee to a consensus on the final plan.

The master plan included land use development phasing, design guidelines, sustainability and preservation protection areas.

**SERVICES PROVIDED**

- Master Planning
- Landscape Architecture
- Civil Engineering
- Surveying

**COLLABORATED WITH**

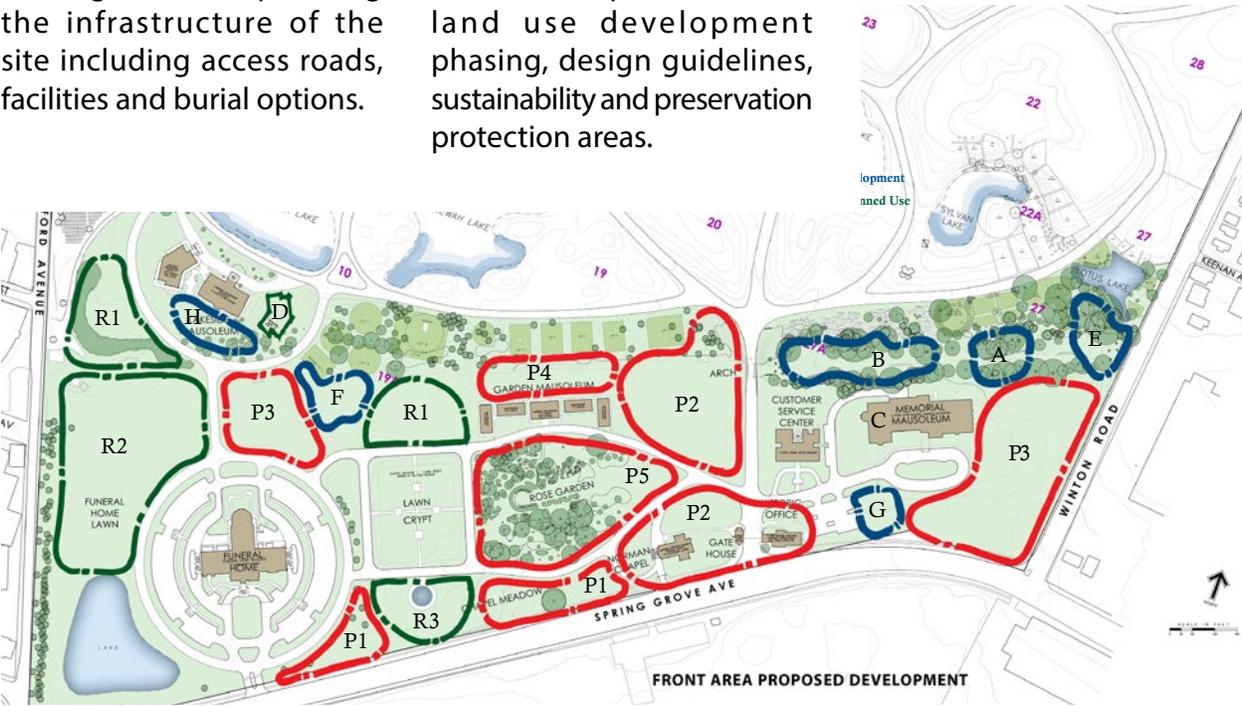
Allison R. Leavitt, Ph.D.  
*Landscape Architect, Land Use & Environmental Planner*  
Earth Patterns Ltd.

**REFERENCE**

**Mark Funke**  
*Senior Grounds Manager*  
Spring Grove Cemetery & Arboretum  
513.681.7526  
mfunke@springgrove.org

**WEBSITE**

[www.springgrove.org](http://www.springgrove.org)



**Rest Haven Memorial Park**  
Evendale, Ohio



For over 15 years, MSP has provided master planning, architecture, landscape architecture, civil engineering, and surveying services to Rest Haven Memorial Park.

As an alternative burial option, a cremation garden was created for Rest Haven Memorial Park. McGill Smith Punshon was responsible for the project's conceptual design

options, design development and construction documents.

The design philosophy included utilizing plant materials and walks to create quiet, intimate spaces. Vegetation was selected to realize year-round aesthetic value and to provide a comfortable integration of visitors with the outdoor environment.

**SERVICES PROVIDED**

- Master Planning
- Architecture
- Landscape Architecture
- Civil Engineering
- Surveying

**REFERENCES**

**David Shanteau**  
888.591.9002  
dave@shanteauconsulting.com

**Jeff Rathjen**  
*Divisional VP Maintenance  
and Development*  
Stonemor Partners LP  
920.682.5576  
jrath@stonemor.com

**WEBSITE**

resthavenmemorialpark.com





1602 Greenwood Avenue, Hamilton Ohio 45011, 888-591-9002  
info@shanteauconsulting.com

## **Shanteau Consulting Services Project Samples**

### **Village of South Russell Ohio**

**Contact: Ed Pyle (317) 698-3724**

Created and developed a prospective cemetery concept for the Village of South Russell Ohio. Documents that were developed included; Cemetery Layout, Cemetery Rules and Regulations, Interment Right Purchase Agreements, Price Sheets, Miscellaneous Cemetery Administrative Documents, Standard Burial Procedures and Standard Administrative and Maintenance Procedure Manuals.

### **Westwood Cemetery, City of Oberlin Ohio**

**Contact: Dennis Cuthbertson (440) 775-7252**

Completed a review of the City Cemetery operations, Cemetery documents and procedures that were developed included; Cemetery Rules and Regulations, Interment Right and Miscellaneous Services Purchase Agreements, Price Sheets, Standard Burial Procedures, Standard Administrative and Maintenance Procedures. Miscellaneous Cemetery Administrative Documents, Cemetery Maintenance Standards and related procedures for continued practice of acceptable cemetery standards.

### **Elm Grove Cemetery, St Mary's Ohio**

**Contact: Kraig Noble (419) 394-7441**

Conducted Administrative and Financial Reviews, Developed Cemetery Rules and Regulations, Interment Right and Miscellaneous Service Purchase Agreements, Price Sheets, Miscellaneous Cemetery Administrative Documents, Cemetery Maintenance Standards and related procedures for continued practice of acceptable cemetery standards.

### **Plum Creek Cemetery, Pittsburg Pa**

**Contact: Brady Clarke (724) 640-2899**

Conducted Administrative and Financial Reviews, Developed Cemetery Rules and Regulations, Price Sheets, Miscellaneous Cemetery Administrative Documents, Cemetery Maintenance Standards and related procedures for continued practice of acceptable cemetery standards. Managed a review of current interment right inventory and a study for the need of additional cemetery property. Currently under contract to develop a new Chapel Mausoleum Facility.

### **Greenwood Cemetery, Hamilton Ohio**

**Contact: James Fitton (513) 405-6388**

Conducted Administrative and Financial Reviews, Developed Cemetery Rules and Regulations, Price Sheets, Miscellaneous Cemetery Administrative Documents, Cemetery Maintenance Standards and related procedures for continued practice of acceptable cemetery standards. Developed new interment right burial sections, cremation scattering and niche gardens and supervised the development of a new Chapel Mausoleum Facility. Currently under contract.

## 3.1 Equal Employment Opportunity

Equal Employment Opportunity has been and continues to be both policy and practice at McGill Smith Punshon, Inc. Our policy of Equal Employment Opportunity is:

- A. Recruit, hire, train and promote persons in all job classifications without regard to race, color, religion, national origin, sex, age, disability, veteran or any other protected status.
- B. Base decisions on employment so as to further the principles of Equal Employment Opportunity.
- C. Ensure that promotion decisions are in accord with principles of Equal Employment Opportunity.
- D. Ensure that all personnel actions such as compensation, benefits, transfers, layoffs, return from layoff, and any social or recreational programs, will be administered in accordance with the principles of Equal Employment Opportunity.

In carrying out its commitment to equal employment opportunity, McGill Smith Punshon, Inc. will make reasonable accommodation for applicants and employees with known disabilities who can perform the essential functions of the job with or without such accommodations. As a consequence, applicants and employees requiring any reasonable accommodations should notify the Human Resource Department.

Our design team will provide comprehensive master planning services for the future planning and expansion of Oak Grove Cemetery. We will facilitate the development of master plan utilizing an interactive process of Cemetery/City staff along with interested stakeholders. This interactive planning approach will serve as a blueprint for the future, guide cemetery development, ensure functionality and providing strategies for implementation. Below is our work plan:

## **Discovery Phase**

### **1. Discovery**

- a. Conduct a discovery session with City and Cemetery staff
- b. Assess regions burial needs, and historical data
- c. Review area demographics
- d. Review cemetery history
- e. Collect available base mapping data
- f. Formulate a schedule
- g. Discuss current marketing plan

### **2. Site Analysis**

- a. Conduct a site reconnaissance of the cemetery with City/cemetery staff
- b. Determine site opportunities and constraints
- c. Analyze current section development and densities
- d. Determine current available area for development

### **3. Discovery Charrette –**

Workshop with Cemetery Committee and City Staff

- a. Review outcome of discovery and analysis phases
- b. Discuss interments and memorial options, and review innovative trends such as green burials
- c. Confirm and refine development options based on identified needs, trends, and site opportunities and constraints
- d. Review project schedule and next steps

## **Preliminary Design Phase**

### **1. Conceptual Land Plan –**

The MSP team will develop two design alternatives based on the outcome of the discovery phase and identified burial trends. The conceptual land plans shall consider the following:

- a. Efficiently and aesthetically maximize interment density based on need and trends
- b. Expand the longevity of the cemetery
- c. Interment and memorialization alternatives/options, including green burials
- d. Options for infill interments
- e. On-site and off-site parking
- f. Pedestrian and vehicle circulation and access
- g. Landscaping, site furnishings and signage type and placement
- h. Security and maintenance, lighting
- i. Buffers and screening for city service area, vehicles and equipment
- j. Cemetery house/office utilization options
- k. Preservation & Conservation
- l. Environmentally sustainable design principles

## 2. Design Charrette –

Workshop with Cemetery Committee

- a. Review design alternatives with Cemetery Committee and City Staff
- b. Based on input, select a preferred design direction and finalize conceptual land plan

## 3. Community Design Meeting with selected stakeholders to solicit input on the conceptual land plan

### **Final Master Plan**

#### 1. Master Plan –

Based on the approved design alternative and the outcome of Design Charrette and Community Design Meeting, the MSP team will finalize the plan. The master plan will be dimensionally accurate, incorporating agreed upon elements. The master plan will include the following deliverables:

- a. Final master plan in color
- b. Phasing /expansion/preservation plan
- c. Development opinion of probable construction cost
- d. Summary of design process including recommendations and conclusions
- e. Policy and Funding recommendations
- f. Recommendations and best practices for a successfully supervised and operated conservation program through city staff, volunteer groups, or both.
- g. Marketing Plan – including objectives, key messages, advertising opportunities, and implementation timeline.
- h. Final presentation

### **Recommended Alternative Consulting Services**

1. Cemetery Rules and Regulation Development
2. Pricing and Product Mix
3. Sales Contract Development
4. Prepare Recommendations for Administrative, Operational and Maintenance Procedures with Documents
5. Cemetery Administrative, Operational, and Maintenance Procedures Training

## Fee Proposal

The following lump sum fee proposal is based on our current understanding of the project as described in the RFP published by the City of Delaware, and may be adjusted based on the final approved scope.

Master Planning Services	\$23,700
Alternative Consulting Services	\$ 5,800
<b>Total</b>	<b>\$29,500</b>
Reimbursables ( <i>Estimated</i> )	\$ 800

## References

### DAYTON MEMORIAL PARK CEMETERY

**Mark Davis**, *General Manager*

937.890.1831

mdavis@daytonmemorialpark.com

### SPRING GROVE CEMETERY & ARBORETUM

**Mark Funke**, *Senior Grounds Manager*

513.681.7526

mfunke@springgrove.org

### SPRING GROVE CEMETERY GROUNDS MAINTENANCE BUILDING

**Dave Lingo**, *Facility Specialist*

513.853.6859

dlingo@springgrove.org

### REST HAVEN MEMORIAL PARK

**Jeff Rathjen**, *Divisional VP Maintenance and Development*

Stonemor Partners LP

920.682.5576

jrath@stonemor.com

### VILLAGE OF SOUTH RUSSELL, OHIO

Ed Pyle

317.698.3724

### WESTWOOD CEMETERY, CITY OF OBERLIN, OHIO

Dennis Cuthbertson

440.775.7252

### ELM GROVE CEMETERY, ST MARY'S, OHIO

Kraig Noble

419.394.7441

### PLUM CREEK CEMETERY, PITTSBURG, PA

Brady Clarke

724.640.2899

### GREENWOOD CEMETERY, HAMILTON, OHIO

James Fitton

513.405.6388

## Dismissal or Termination

We have not been dismissed or terminated by any clients within the last twelve months..

MSP is committed to community and quality service.  
We have built our reputation on a pledge of excellence which has  
been the cornerstone of our past and a foundation for the future.



1984 McGill Smith Punshon

Thomas B. Punshon 1962

1961 James S. Wald &  
Thomas B. Punshon

Thomas B. Punshon 1906

1890 Earnshaw & Punshon

Joseph Earnshaw 1856

**McGill Smith Punshon, Inc.**  
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Cincinnati, Ohio 45241  
Phone 513.759.0004  
Fax 513.563.7099  
[www.mcgillsmithpunshon.com](http://www.mcgillsmithpunshon.com)



**January 30, 2018**  
**Pollock Venture LLC**  
**7.5 Mill NCA Charge**

Development Assumptions

Total Lots	800	Total Market Value at Full Build-Out	\$320,000,000
Average Value per Unit	\$400,000	Assessed Value at Full Build Out (35%)	\$112,000,000

NCA Charge (in mills) 7.50

		Real Property Improvements				NCA Charge Calculation	
		Realization Factor	100.00%			Mills 7.5000	
		Assessed Value Factor	35.00%				
Year	Units Built	Annual Market Value of Improvements	Assessed Value of Improvements	Accumulated Assessed Value of Improvements	NCA Charge		
2018	0	\$0	\$0	\$0	\$0		
2019	40	\$16,000,000	\$5,600,000	\$5,600,000	\$0		
2020	85	\$34,000,000	\$11,900,000	\$17,500,000	\$42,000		
2021	85	\$34,000,000	\$11,900,000	\$29,400,000	\$131,250		
2022	85	\$34,000,000	\$11,900,000	\$41,300,000	\$220,500		
2023	85	\$34,000,000	\$11,900,000	\$53,200,000	\$309,750		
2024	85	\$34,000,000	\$11,900,000	\$65,100,000	\$399,000		
2025	85	\$34,000,000	\$11,900,000	\$77,000,000	\$488,250		
2026	85	\$34,000,000	\$11,900,000	\$88,900,000	\$577,500		
2027	85	\$34,000,000	\$11,900,000	\$100,800,000	\$666,750		
2028	80	\$32,000,000	\$11,200,000	\$112,000,000	\$756,000		
2029	0	\$0	\$0	\$112,000,000	\$840,000		
2030	0	\$0	\$0	\$112,000,000	\$840,000		
2031	0	\$0	\$0	\$112,000,000	\$840,000		
2032	0	\$0	\$0	\$112,000,000	\$840,000		
2033	0	\$0	\$0	\$112,000,000	\$840,000		
2034	0	\$0	\$0	\$112,000,000	\$840,000		
2035	0	\$0	\$0	\$112,000,000	\$840,000		
2036	0	\$0	\$0	\$112,000,000	\$840,000		
2037	0	\$0	\$0	\$112,000,000	\$840,000		
2038	0	\$0	\$0	\$112,000,000	\$840,000		
2039	0	\$0	\$0	\$112,000,000	\$840,000		
2040	0	\$0	\$0	\$112,000,000	\$840,000		
2041	0	\$0	\$0	\$112,000,000	\$840,000		
2042	0	\$0	\$0	\$112,000,000	\$840,000		
2043	0	\$0	\$0	\$112,000,000	\$840,000		
2044	0	\$0	\$0	\$112,000,000	\$840,000		
2045	0	\$0	\$0	\$112,000,000	\$840,000		
2046	0	\$0	\$0	\$112,000,000	\$840,000		
2047	0	\$0	\$0	\$112,000,000	\$840,000		
2048	0	\$0	\$0	\$112,000,000	\$840,000		
2049	0	\$0	\$0	\$112,000,000	\$840,000		
2050	0	\$0	\$0	\$112,000,000	\$840,000		
2051	0	\$0	\$0	\$112,000,000	\$840,000		
2052	0	\$0	\$0	\$112,000,000	\$840,000		
2053	0	\$0	\$0	\$112,000,000	\$840,000		
2054	0	\$0	\$0	\$112,000,000	\$840,000		

2055	0	\$0	\$0	\$0	\$112,000,000	\$840,000
2056	0	\$0	\$0	\$0	\$112,000,000	\$840,000
2057	0	\$0	\$0	\$0	\$112,000,000	\$840,000
2058	0	\$0	\$0	\$0	\$112,000,000	\$840,000
2059	0	\$0	\$0	\$0	\$112,000,000	\$840,000
2060	0	\$0	\$0	\$0	\$112,000,000	\$840,000
2061	0	\$0	\$0	\$0	\$112,000,000	\$840,000
Totals	800					\$30,471,000

**January 30, 2018  
Pollock Venture LLC**

**8.5 Mill NCA Charge**

**Development Assumptions**

Total Lots	800	Total Market Value at Full Build-Out	\$320,000,000
Average Value per Unit	\$400,000	Assessed Value at Full Build Out (35%)	\$112,000,000

NCA Charge (in mills)                      8.50

		Real Property Improvements				NCA Charge Calculation	
		Realization Factor	100.00%	35.00%	Mills 8.5000		
Year	Units Built	Annual Market Value of Improvements	Assessed Value of Improvements	Accumulated Assessed Value of Improvements	NCA Charge		
2018	0	\$0	\$0	\$0	\$0	\$0	
2019	40	\$16,000,000	\$5,600,000	\$0	\$0	\$0	
2020	85	\$34,000,000	\$11,900,000	\$5,600,000	\$0	\$47,600	
2021	85	\$34,000,000	\$11,900,000	\$17,500,000	\$0	\$148,750	
2022	85	\$34,000,000	\$11,900,000	\$29,400,000	\$0	\$249,900	
2023	85	\$34,000,000	\$11,900,000	\$41,300,000	\$0	\$351,050	
2024	85	\$34,000,000	\$11,900,000	\$53,200,000	\$0	\$452,200	
2025	85	\$34,000,000	\$11,900,000	\$65,100,000	\$0	\$553,350	
2026	85	\$34,000,000	\$11,900,000	\$77,000,000	\$0	\$654,500	
2027	85	\$34,000,000	\$11,900,000	\$88,900,000	\$0	\$755,650	
2028	80	\$32,000,000	\$11,200,000	\$100,800,000	\$0	\$856,800	
2029	0	\$0	\$0	\$112,000,000	\$0	\$952,000	
2030	0	\$0	\$0	\$112,000,000	\$0	\$952,000	
2031	0	\$0	\$0	\$112,000,000	\$0	\$952,000	
2032	0	\$0	\$0	\$112,000,000	\$0	\$952,000	
2033	0	\$0	\$0	\$112,000,000	\$0	\$952,000	
2034	0	\$0	\$0	\$112,000,000	\$0	\$952,000	
2035	0	\$0	\$0	\$112,000,000	\$0	\$952,000	
2036	0	\$0	\$0	\$112,000,000	\$0	\$952,000	
2037	0	\$0	\$0	\$112,000,000	\$0	\$952,000	
2038	0	\$0	\$0	\$112,000,000	\$0	\$952,000	
2039	0	\$0	\$0	\$112,000,000	\$0	\$952,000	
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2041	0	\$0	\$0	\$112,000,000	\$0	\$952,000	
2042	0	\$0	\$0	\$112,000,000	\$0	\$952,000	
2043	0	\$0	\$0	\$112,000,000	\$0	\$952,000	
2044	0	\$0	\$0	\$112,000,000	\$0	\$952,000	
2045	0	\$0	\$0	\$112,000,000	\$0	\$952,000	
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2054	0	\$0	\$0	\$112,000,000	\$0	\$952,000	
2055	0	\$0	\$0	\$112,000,000	\$0	\$952,000	
2056	0	\$0	\$0	\$112,000,000	\$0	\$952,000	
2057	0	\$0	\$0	\$112,000,000	\$0	\$952,000	
2058	0	\$0	\$0	\$112,000,000	\$0	\$952,000	
2059	0	\$0	\$0	\$112,000,000	\$0	\$952,000	
2060	0	\$0	\$0	\$112,000,000	\$0	\$952,000	
2061	0	\$0	\$0	\$112,000,000	\$0	\$952,000	
<b>Totals</b>	<b>800</b>					<b>\$34,533,800</b>	

**January 30, 2018  
Pollock Venture LLC**

**10 Mill NCA Charge**

**Development Assumptions**

Total Lots	800	Total Market Value at Full Build-Out	\$320,000,000
Average Value per Unit	\$400,000	Assessed Value at Full Build Out (35%)	\$112,000,000

NCA Charge (in mills) **10.00**

		Real Property Improvements				NCA Charge Calculation	
		Realization Factor	100.00%	Assessed Value of Improvements	35.00%	Accumulated Assessed Value of Improvements	Mills 10.0000
Year	Units Built	Annual Market Value of Improvements	Assessed Value of Improvements	Assessed Value of Improvements	Value of Improvements	Value of Improvements	NCA Charge
2018	0	\$0	\$0	\$0	\$0	\$0	\$0
2019	40	\$16,000,000	\$5,600,000	\$5,600,000	\$0	\$0	\$0
2020	85	\$34,000,000	\$11,900,000	\$11,900,000	\$5,600,000	\$5,600,000	\$56,000
2021	85	\$34,000,000	\$11,900,000	\$11,900,000	\$17,500,000	\$17,500,000	\$175,000
2022	85	\$34,000,000	\$11,900,000	\$11,900,000	\$29,400,000	\$29,400,000	\$294,000
2023	85	\$34,000,000	\$11,900,000	\$11,900,000	\$41,300,000	\$41,300,000	\$413,000
2024	85	\$34,000,000	\$11,900,000	\$11,900,000	\$53,200,000	\$53,200,000	\$532,000
2025	85	\$34,000,000	\$11,900,000	\$11,900,000	\$65,100,000	\$65,100,000	\$651,000
2026	85	\$34,000,000	\$11,900,000	\$11,900,000	\$77,000,000	\$77,000,000	\$770,000
2027	85	\$34,000,000	\$11,900,000	\$11,900,000	\$88,900,000	\$88,900,000	\$889,000
2028	80	\$32,000,000	\$11,200,000	\$11,200,000	\$100,800,000	\$100,800,000	\$889,000
2029	0	\$0	\$0	\$0	\$112,000,000	\$112,000,000	\$1,008,000
2030	0	\$0	\$0	\$0	\$112,000,000	\$112,000,000	\$1,120,000
2031	0	\$0	\$0	\$0	\$112,000,000	\$112,000,000	\$1,120,000
2032	0	\$0	\$0	\$0	\$112,000,000	\$112,000,000	\$1,120,000
2033	0	\$0	\$0	\$0	\$112,000,000	\$112,000,000	\$1,120,000
2034	0	\$0	\$0	\$0	\$112,000,000	\$112,000,000	\$1,120,000
2035	0	\$0	\$0	\$0	\$112,000,000	\$112,000,000	\$1,120,000
2036	0	\$0	\$0	\$0	\$112,000,000	\$112,000,000	\$1,120,000
2037	0	\$0	\$0	\$0	\$112,000,000	\$112,000,000	\$1,120,000
2038	0	\$0	\$0	\$0	\$112,000,000	\$112,000,000	\$1,120,000
2039	0	\$0	\$0	\$0	\$112,000,000	\$112,000,000	\$1,120,000
2040	0	\$0	\$0	\$0	\$112,000,000	\$112,000,000	\$1,120,000
2041	0	\$0	\$0	\$0	\$112,000,000	\$112,000,000	\$1,120,000
2042	0	\$0	\$0	\$0	\$112,000,000	\$112,000,000	\$1,120,000
2043	0	\$0	\$0	\$0	\$112,000,000	\$112,000,000	\$1,120,000
2044	0	\$0	\$0	\$0	\$112,000,000	\$112,000,000	\$1,120,000
2045	0	\$0	\$0	\$0	\$112,000,000	\$112,000,000	\$1,120,000
2046	0	\$0	\$0	\$0	\$112,000,000	\$112,000,000	\$1,120,000
2047	0	\$0	\$0	\$0	\$112,000,000	\$112,000,000	\$1,120,000
2048	0	\$0	\$0	\$0	\$112,000,000	\$112,000,000	\$1,120,000
2049	0	\$0	\$0	\$0	\$112,000,000	\$112,000,000	\$1,120,000
2050	0	\$0	\$0	\$0	\$112,000,000	\$112,000,000	\$1,120,000
2051	0	\$0	\$0	\$0	\$112,000,000	\$112,000,000	\$1,120,000
2052	0	\$0	\$0	\$0	\$112,000,000	\$112,000,000	\$1,120,000
2053	0	\$0	\$0	\$0	\$112,000,000	\$112,000,000	\$1,120,000
2054	0	\$0	\$0	\$0	\$112,000,000	\$112,000,000	\$1,120,000
2055	0	\$0	\$0	\$0	\$112,000,000	\$112,000,000	\$1,120,000
2056	0	\$0	\$0	\$0	\$112,000,000	\$112,000,000	\$1,120,000
2057	0	\$0	\$0	\$0	\$112,000,000	\$112,000,000	\$1,120,000
2058	0	\$0	\$0	\$0	\$112,000,000	\$112,000,000	\$1,120,000
2059	0	\$0	\$0	\$0	\$112,000,000	\$112,000,000	\$1,120,000
2060	0	\$0	\$0	\$0	\$112,000,000	\$112,000,000	\$1,120,000
2061	0	\$0	\$0	\$0	\$112,000,000	\$112,000,000	\$1,120,000
<b>Totals</b>	<b>800</b>						<b>\$40,628,000</b>

**TERRA ALTA / STOCKDALE NCA COST ANALYSIS**

<u>Category of Cost</u>	<u>Cost Estimate</u>	<u>When Cost Incurred</u>	<u>Notes</u>
Terra Alta Lift Station & Force Main Sewer	\$1,281,307.60	2017 -18	All work completed except building to be completed in 2018 at cost of \$50,000. City to reimburse for upsizing.
16" Water Line (East side of Pollock Rd)	\$911,736.00	2018	
Stockdale Offsite Engineering and Design - Advanced Civil Design	\$30,000.00	2017	
Stockdale Offsite Sanitary Sewer Line	\$400,000.00	2018	
Braumiller Rd. Roundabout Budget	\$400,000.00	2018	
Braumiller Rd. Ox-Bow Work Budget	\$90,000.00	2018	This may not be required
Fees for Sanitary Sewer Easements to Methesco	\$75,000.00	2017	Reimbursement paid to Frank Hook
Fees for Sanitary Sewer Easements to Dever	\$100,000.00	2018	Not yet finalized
16" Waterline, Lift Station and Force Main Sewer Design - EMH&T	\$197,000.00	2017	
Inspection Fees 16" Water Main & Lift Station and Force Main Sewer	\$157,000.00	2017	
Terra Alta Phase 1 - 1025 SY / \$37	\$37,925.00	2017	City required extra widths
Terra Alta Phase 2 - 1590 SY / \$37	\$58,830.00	2018-19	City required extra widths
Terra Alta Phase 2 South - 380 SY / \$37	\$14,060.00	2018-19	City required extra widths
Stockdale Farms 40' - 1600 SY / \$37	\$59,200.00	2018	City required extra widths
Stockdale Farms 36' - 800 SY / \$37	\$29,600.00	2019-20	City required extra widths
Rogers Tract - 705 SY / \$37	\$26,085.00	2019-20	City required extra widths
Walking Trails Budget	\$350,000.00	2018-19-20	
Common Areas Features		2018-19-20	
Parks (Playground Equipment)		2018-19-20	
Community Center Clubhouse & Pool in Terra Alta and Stockdale	\$1,600,000.00	See Notes	2018 Terra Alta, 2020 Stockdale
Entrance Features	\$500,000.00	See Notes	\$300,000 for Terra Alta Phase 1 2018, \$100,000 for Stockdale 2019, \$100,000 for Terra Alta Phase 2 2020
Street Trees	\$200,000	2018-19-20	
Accrued Interest			
<b>TOTAL</b>	<b>\$6,517,743.60</b>		



REVISIONS	

**ILLUSTRATIVE PLAN**

**STOCKDALE FARMS**  
 Prepared for:  
**LTH, LLC**  
 10000  
 DUBLIN, OH 43017

**Paris Planning & Design**  
 LAND PLANNING    LANDSCAPE ARCHITECTURE  
 243 N. 27th Street    Suite 421    Columbus, OH 43215  
 p (614) 451-1194    www.parisplanninganddesign.com

DATE	3/4/2015
PROJECT	15027
SHEET	

**EX-I.1**

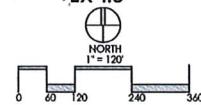




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DEVELOPER  
POLLOCK VENTURE, LLC.  
10000 SANDY CREEK DRIVE  
DOWNSIDE, OH 43015

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# Terra Alta

