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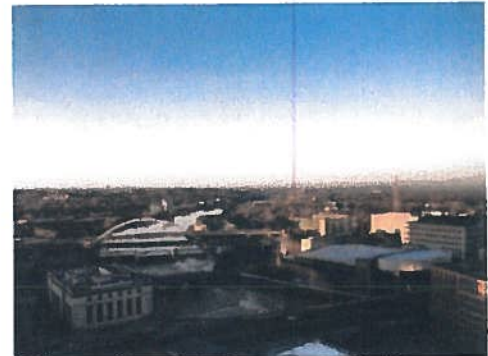
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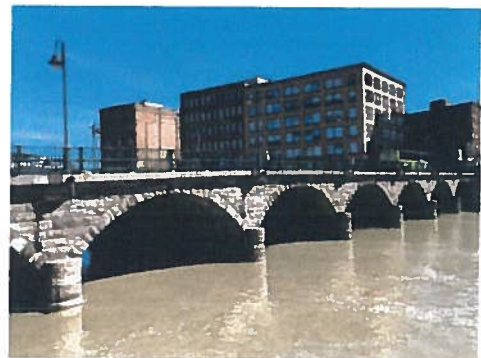
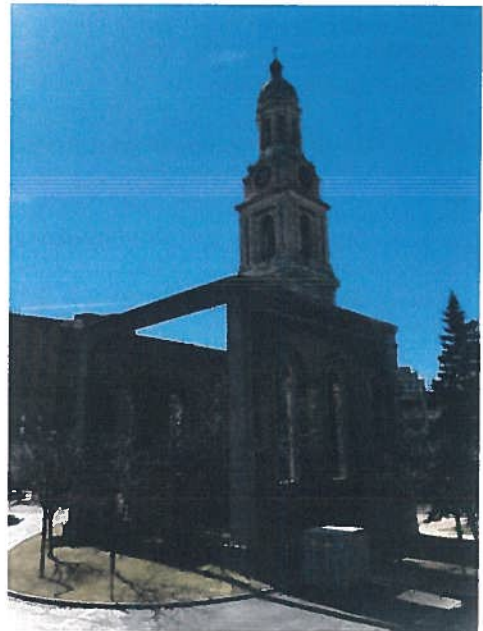
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Executive Summary

The City of Rochester commissioned Westlake Reed Leskosky (WRL) to study the feasibility of a new Rochester Performing Arts Center (RPAC) in downtown Rochester, New York. The WRL team included strategic consultants for this endeavor including AMS Planning and Research to evaluate the market and economic impact of a new arts center, Fisher Associates to evaluate site conditions, and Nasco Construction Services to develop probable cost estimates.

The consulting team reviewed prior studies performed relative to this new initiative and made assessments of those studies – see Tab 1, item a. With City Leadership, the consulting team participated in a planning workshop conducted by Lincoln Center to ensure a broader perspective was taken during the study, with key focus issues also identified. The consulting team then met with City leadership including arts and culture stakeholders in the community to assess the needs and desires for a new arts center. Detailed programs were developed for a range of options for the scope and breadth of the RPAC. These included providing a new hall to enable the Rochester Broadway Theater league (RBTL) to move downtown into a new facility, providing additional smaller venues to supplement the rich and diverse arts community that exists in Rochester, and combinations thereof. Following test fits of different programs on different sites and the evaluation of the various sites and costs, a range of options and costs for the new RPAC were reviewed with City leadership. It was agreed that (2) options provided the most viable and suitable results for the new RPAC.

Option 1 (Tab 3) provides a new 2,850 seat hall on site #10 (Parcel 5) with the maximum amount of additional structured parking that could be provided on that site. Were there to be community interest to develop a more comprehensive facility that provided needed support spaces for a greater range of arts groups, Option 2 was developed on Site #8, see Tab 6.

An Economic Demographic and Market Analysis for the new RPAC was developed (see Tab 2) and a Financial Plan and Economic Impact Analysis performed. An assessment of the site conditions for the two preferred sites was performed, and opinions of probable costs developed for both options. On behalf of the entire consulting team, WRL has been proud to have participated in this effort to assist Rochester, the City of the Arts, to build on its rich history with the arts for generations to come.

Rochester Performing Arts Center Site and Facility Study

Synthesis of Background Information

May 5, 2016

The following is an interim summary of the work performed to date for the Rochester Performing Arts Center Site and Feasibility Study relative to the preliminary synthesis of background information prior to the January kick-off meetings.

1. AMS Feasibility Study (1997)

- Commissioned by RBTL and Flaum Management Company
- Idea had already been in discussion for several years
- Key contacts were John Parkhurst of RBTL and David Del Monte of Flaum management
- Market:
 - Primary market: Concluded 75%-90% of audiences (across the country) will come from within 30 miles of the facility (radius), so used 30 mile radius as the market
 - Population was 944,000 in 1996
 - Concluded growth would not be a major factor and should concentrate on current demand
 - Slightly higher median income and education level than the US
 - Secondary market: between 30 and 90 miles from facility (excluding Canada)
 - Included Buffalo and Syracuse
 - Population was 2.6 million (80% in Buffalo and Syracuse)
 - Success in secondary market would be dependent on differentiation from offering available in Toronto, Buffalo, and Syracuse
 - Patron file analysis of 21,388 households from RBTL, including subscribers and single ticket buyers (separate report)
 - 90% of all RBTL buyers reside in the 30 mile primary market and nearly 75% are within 15 miles of downtown
 - Market coverage of 5.3% of households (comparable or higher than other similar markets), so increase audience growth will likely come from diversification of programming
 - Lifestyle: "A diverse audience base suggests long-term stability in terms of demand for a range of programs, and represents an opportunity for the proposed facility to maintain and broaden the audience base through diversified programming, including both popular entertainment and traditional art forms."
- Existing arts infrastructure
 - Arts Council had a membership of 100 cultural organizations
 - Felt there was a need to accommodate smaller organizations as well as touring Broadway
 - The Cultural Development Plan "Blueprint for Action" in 1995 called for the establishment of a high-profile, accessible cultural industry center, with the Arts & cultural council as the Centers coordinating agency
 - Potential Users (estimated 212 use days (130 performance) in a 2,000-3,000 seat hall and 134 use days (66 performance) in a 1,200-1,800 seat hall)

Rochester Performing Arts Center Site and Facility Study

- Eastman School of Music (3,094 seat performance hall and 5 recital halls/rooms)
- Garth Fagan Dance Company (wanted facility from 1,000-1,500 seats for two, two-week seasons)
- GeVa Theatre (Wanted new 130 seat space adjacent to existing facility; Would seriously consider using a 1,00-1,500 seat auditorium for a musical or special event)
- Opera Theatre of Rochester (Co-presented the New York City Opera for one night with RBTL, produced a 2-performance Opera, and co-presented one performance with the Ballet; Wanted a space with max capacity of 1,500 for their production, or 2,000 seats for presented)
- Rochester Arts and Lectures (Six main events + 4 mini-series lectures presented at the Downtown United Presbyterian Church (cap 850); Ideal space would be 1,000-1,500 seats)
- RBTL: At the time partnered with NAC Enterprises; in 1995 presented 12 weeks of Broadway (six singles, one six-week run of Phantom); Subscriptions at 4,800; Also presented classical and popular entertainment at Finger Lakes amphitheater; Operates Ticket Express Box Office, which provides ticketing services for other non-profit and commercial events; Manages Auditorium Theater and Finger Lakes PAC (Ideal would be 2,500-3,00 seat road-house)
- Rochester City Ballet (would want large hall (above 2,000 seats) for holiday and spring programs, and 1,000 seats for summer and fall presenting series)
- Rochester Festivals (City produced/presented programs including Lunch Spot Comps, Manhattan Nights Dance Parties and Manhattan Square Park, Garden Parties at the Maplewood Rose Gardens, Festivals at the Falls, HarborFest, Concerts by the Shore)
- Rochester Philharmonic Orchestra (60-concert series at the Eastman and short series at Finger Lakes Ideal room would a concert hall with less than 2,000 seats)
- Existing Facilities: Finger Lakes PAC Amphitheater, The Auditorium Theater, Eastman Theatre, Theater on the Ridge, Nazareth College, Roberts Wesleyan College, Kilborn Hall, School of the Arts, Darien lake Amphitheater, Strong Museum Auditorium
- Comparable Markets
 - Used: Cincinnati, Columbus, Charlotte, Nashville, Palm Beach (primarily because each had a new PAC at the time); Found most similarities with Nashville
 - The analysis of Broadway volume across the six markets suggested some "unrealized" market potential for Rochester in the long run, perhaps in the range of 10,000 to 20,000 seats per year (20-30% increase), not counting blockbusters; "The opening of a new facility may be expected to boost Broadway volume both in the short term... and to sustain a moderately higher volume in the long-run."

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- Recommended spaces: 2,500-3,000 seat venue AND one of three other options: 1) 1,000-1,200 seat community performance space, 2) Multi-purpose flat floor room, OR 3) Community arts spaces (small informal studio, rehearsal, and performance spaces)
- Program:
 - 2,700 seat Performance Hall (103,990 nsf with support space and lobby)
 - Est \$28.8 million- \$45.2 million
 - 1,200-seat Community Auditorium (49,980 nsf with support space and lobby)
 - Est \$13.8 million - \$21.7 million
 - Multi-purpose room (250 capacity; 15,250 nsf)
 - Est \$3.6 million - \$4.8 million
 - Cultural Industry Center (separate facility, possibly adaptive re-use) with admin offices, community gallery, rehearsal rooms, and classrooms (17,460 nsf)
 - Est \$3.2 million-\$4.4 million construction cost
- Pro forma:
 - Revenue: \$1,586,714
 - Expenses: \$2,167,644
 - Operating result of \$(580,930)
 - Capital reserve of \$376,000

2. AMS RPAC Needs Assessment (1998)

- Interviewed potential users again, and some additional ones
 - Major potential users:
 - RBTL
 - Eastman School (rehearsal spaces and high-quality venue for music 1,200 seats; full access to facility)
 - Rochester Philharmonic (high quality venue for music: Post at 2,500 seats, classical at 1,500-1,800 seats, rehearsal space)
 - Other potential users (Garth Fagan Dance, SUNY Brockport, Rochester city Ballet, GeVa, Opera Theater of Rochester, Rochester Children's Theatre, Arts & Lecture, Rochester Events Network, Writers and Books)
 - Need medium-sized venue (500-1,000 seats), scheduling access, affordable rental rates
 - Other needs: Reception space, rehearsal space, office space, scene shops, costume shops, storage space, educational/classroom space
 - With the exception of RBTL, no single organization will provide a high enough level of programming to warrant a single venue type (i.e. concert hall, dance space)
- Existing large venues
 - Eastman Theatre
 - Too large for most uses except Broadway and Pops
 - Not appropriate for Broadway in current state
 - Limited access
 - Lack of Patron amenities
 - Auditorium Theater
 - Needs significant renovation and modernization (needs A/C, backstage)
 - Too large for many smaller users

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- Others: Hochstein, Kilbourn Hall, SOTA, Panara, JCC, Nazareth
 - All have heavy use
 - Gap: High-quality, appropriately sized venue for music, modern venue for touring musical theatre and dance, Mid-sized venues for various uses, downtown venue to address audience "access" and patron services
 - Conclusions:
 - Performing arts organizations in Rochester are under-served by existing facilities
 - High-probability users require two distinct capacities and will present and produce different types of programs that require different venue forms
 - Any new or retrofitted venues would need to accommodate a range of activities
 - A large venue is required for stage theatrical productions and popular music events
 - A mid-size venue is needed to accommodate classical music and dance
 - Both venues should showcase the variety of arts organizations in Rochester
 - Issues
 - Smaller orgs express some concern that their needs are not being addressed; A coalition has been developed
 - Recommended program:
 - Road house of more than 2,500 seats
 - Music Hall of between 1,200 and 1,800 seats for music and dance
 - Playhouse of under 900 seats for dance, theater, and music
 - Small theater of 300-500 seats for a broad range of uses
3. **AMS RPAC Operating Pro Forma (2000)**
- Base case operating scenario
 - Unclear which building program/activity model this connects to, but seems to be linked to 2008 work
 - For base year:
 - Earned revenues: \$3,166,949
 - Operating Expenses: \$4,005,739
 - Operating result: \$(838,791)
 - Support and Funding \$428,490
 - Results after funding \$(410,301)
 - Recommends working capital of \$1.5 million to \$2.0 million for the first year
4. **Webb Management Services Report** (note this was identified as a report that is less relevant to current project)
- Feasibility Study, Site Analysis and Business Plan for New Performing Arts Facilities in Rochester, NY (2006)
 - Prepared by Webb Management Services
 - Commissioned as part of the Renaissance Square project
 - Assumptions:
 - Proposed to host approx. 798 total use days (179 in large theatre, 314 in mid-sized theater, and 305 in 250 seat)
 - Estimated attendance of 601,828 for activity in all three spaces
 - 320,000 square foot building program

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- 2,800 seat venue, 1,500 seat performance hall, 250 seat theater, rehearsal hall, 2 classrooms
- Pro forma (third year of operations, 2005\$):
 - Operating revenue: \$16.7 million
 - Non-operating revenue: \$1.7 million
 - Operating expenses: \$18.3million
- Economic Impact Projected:
 - Annual Impact: \$7,020,000 (91 jobs)

5. Renaissance Square Performing Arts Center Operation Plan and Economic Impact Analysis (2008)

- a. Commissioned by the City
- b. Prepared by Strategic Advisory Group for Main & Clinton Local Development Corp. in advance of the Main & Clinton's board meeting in October 2008
- c. Renaissance Square was a proposed mixed-use project on the north side of East Main Street between Clinton Avenue, St. Paul Street and Pleasant Street, consisting of a new transit center, a new campus for Monroe Community College, and a new Performing arts center.
- d. Assumptions:
 - i. RPAC proposed to host approx. 170 performances each year beginning in the third year of operations (68 Broadway, 43 concerts, 20 educational, 10 convention center, 4 not for profit, 25 other rental)
 - ii. 96,700 square foot building program
 - iii. 2,800 seat venue, lobby, and back of house (no other venues or spaces)
 - iv. Increase in FTE staff from 17.6 to 34
 - v. Parking at the 600-space Mortimer Street and St Joseph's garages
 - vi. Ownership by a tax-exempt entity and operated by a dedicated non-profit corp
- e. Pro forma (first year of operations, 2008\$):
 - i. Operating revenue: \$2.3 million
 - ii. Non-operating revenue: \$1.4 million (includes parking, facility fees, hotel tax, and fundraising)
 - iii. Operating expenses: \$3.9 million
 - iv. Net cash flows: \$(175,000)
 - v. Additional annual capital reserve of \$387,000
- f. Economic Impact:
 - i. Estimated \$83 million 'initial investment' (total project cost for RSPAC portion of development)
 - ii. RSPAC is projected to produce \$15.5 million in local direct and indirect spending each year, a \$7.2 million increment over the current Auditorium Theatre and support 90 direct and indirect local jobs (an additional \$3.0 million in earnings)
 - iii. \$136 million in local, state, and federal taxes (\$24 million NPV) over 30 years (\$64 million over the Auditorium Theatre)

Rochester Performing Arts Center Site and Facility Study

6. Midtown Performing Arts Center Financial Plan (March 2010)

- Prepared by Strategic Advisory Group for Midtown Mixed-use development which consists of a hotel, commercial and retail space
- Update from previous report (moves opening back a year)
- Assumptions:
 - 3,000-seat venue
 - Slightly less activity (76 Broadway, 43 Concerts, 6 Educational, 10 Convention Center, 4 Non Profit, 15 Other Rental)
 - Increase to 33 FTE
- Pro forma (first year of operations, 2010\$):
 - All revenue: \$4.2 million
 - Operating expenses: \$3.5 million
 - Net cash flows: \$756,000
 - Additional annual capital reserve of \$446,000

7. PAC Exploratory Report (September 2014)

- Prepared for Mayor Warren by the Community-Based Performing Arts Center Exploratory Committee to assess the feasibility of building and operating a new PAC
 - Convened by the Mayor in May 2014
 - Committee met on three occasions and several members reviewed the SGA study
- Recommendation from the committee is that a new PAC is feasible and warrants additional study
- Key Points include:
 - Based on 3000 seats
 - Debt load must be low or eliminated
 - Proximity to Convention Center was considered key relative to cross programming

8. Lincoln Center Workshop (October 28-30 2015)

The design team joined senior leadership from the City of Rochester and RBTL in a series of workshops with Lincoln Center to better understand and frame the goals, opportunities and challenges for the project. Many important lessons were learned, as well as where energy needed to be focused to ensure opportunities were exploited in the preliminary planning and what pitfalls need to be looked out for. While the takeaways from this exercise were many, questions and highlights included:

- a. Do we need 3000 seat facility?
- b. What do we need 10-100 years down the road, in addition to now?
- c. Consensus building in process is key
- d. Education is an important element for long term viability
- e. Need to build community trust and confidence at each step
- f. Involve stakeholders early in the process
- g. Create a plan to welcome diverse audiences
- h. Strategic assessment of potential funding sources early
- i. This project should strengthen whole arts community, not detract /dillute
- j. Give your audience what they want
- k. Right sizing the facility important, and allowing/planning for growth
- l. Flexibility and resilience in design for multiple functions
- m. Build with the ability to change
- n. Monetize assets

Rochester Performing Arts Center Site and Facility Study

9. RBTL Financial Statements from 2011-2014

a. FY2014:

- i. Support and Revenue: \$11.6 million (incl. \$408,335 of contributions)
- ii. Total Expenses: \$11.3 million
- iii. Excess/(Deficit) before depr. \$277,167
- iv. Assets: \$5.4 million
- v. Liabilities: \$4.8 Million (incl. \$1.0 million in Long Term Debt)
- vi. Net Assets: \$625,000 (rounded)

Broadway Theatre League

RBTL Broadway Series

	2011	2012	2013	2014	2015
# Prod	6	4	7	9	8
# Weeks	8	8	7	8	7
# Splits	1	0	2	2	2
# Perf	69	64	62	66	61
Attendance	116,482	82,443	119,271	112,749	89,845

Rochester Performing Arts Center Site and Facility Study

Arts and Culture Stakeholder Review Summary

April 30, 2016

The following is an interim summary of the work performed to date for the Rochester Performing Arts Center Site and Feasibility Study relative to the engagement with various arts and culture stakeholders in the process.

Rochester is a city with a rich and diverse arts culture. As reviewed from the outset of the study, it is important to engage the organizations that make up this arts culture in and around the City of Rochester in the study process itself. This engagement will help define how the new facility may best serve the various organizations. It will also help ensure that the planning for a new facility is well understood and supported by the community it will be designed to serve.

To this end, with AMS Consulting, WRL met with Mayor Lovely Warren, Kate Washington and other team leaders on January 14 to understand their interest relative to the study. The importance of our engagement with the various stakeholders was stressed. It was recognized that as has been done with previous studies, the Rochester Broadway Theater League (RBTL) is a significant participant and consideration in the study process. However, in addition the study must also consider the important contributions of the smaller arts organizations and assess their needs as well. In the past these needs have proven to be more difficult to assess.

We then conducted a roundtable discussion with the arts and culture stakeholders on January 14, 2016 in Rochester. Attached are the meeting notes from this meeting. During this meeting, WRL and AMS also made a presentation to the arts and culture stakeholders which included:

- A. The overall project approach
- B. A summary of the findings from the Lincoln Center workshop conducted for the study
- C. A summary of our review of the prior Performing Arts Center studies conducted in Rochester between 1997 and 2010
- D. A summary of the preliminary market assessment materials
- E. A summary of reference projects, or benchmark facilities, being considered relative to the current study, including community sizes, plans and images
- F. Next steps in the process

We learned in the January 14 stakeholder meetings that there is a need to better identify the "missing venues" and how the current facility inventory does (and does not) meet the various organizational needs. Specific and substantive comments discussed during the meeting included:

- 1. RBTL needs 2,700-3,000 seats in their facility
- 2. A 250 seat proscenium and approximately a 100 seat flexible space may meet many of the needs of the emerging companies
- 3. Having outdoor performance spaces would be of high value
- 4. Having additional education and meeting space would be of high value
- 5. Existing venues such as the Lyric Theater need to be assessed for how they can best contribute to the arts community needs
- 6. Understanding the governance and management structure of any shared facilities will be an important concern
- 7. Understanding part-time or rental use vs full time use by various users will be important.

A strong concept emerging from the arts and culture stakeholder meetings was to create "constellation" of venues – both new and existing - that would work together to serve the needs of the community. This could in effect become the basis for an "arts district" or "arts corridor". This might suggest a solution that recognizes and enables an arts community that is composed of existing, renovated and new facilities as opposed to being focused primarily and only on a new building.

Westlake Reed Leskosky

Rochester Performing Arts Center Site and Facility Study

As a next step following the January meetings, WRL met with the arts and culture stakeholders in their venues on April 14 to further understand how these existing venues serve them and what needs are not being met. Prior to these meetings and to make them more effective and clear, WRL issued a programming questionnaire to each organization to better understand their usage needs.

In summary the engagement with the arts and culture stakeholders within the community has made clear that there is a tremendous range of organizations now serving and making up the arts culture in Rochester. And that the study should and will ensure that their needs are understood and addressed as best as possible moving forward. The preliminary findings and program recommendations will be reviewed in our upcoming "half-way point" meeting.

MEETING NOTES

Client: City of Rochester
Project: Performing Arts Center
Comm. No.: 15114
File No.: B3

Purpose: Stakeholder Overview Meeting
Location: Rochester City Hall
Meeting Date: January 14, 2016
Date of Notes: January 18, 2016

Time: 2:30pm

Present	Distribution	Name	Company/Department	Email
x	x	Kate Washington	CoR	
X		Tamu Brown Hutchinson	Elaine Spaul/City Council	
X		Marc Iacona	Rochester International Jazz Festival	
X		Heidi Zimmer-Meyer	Rochester Downtown Development Corp	
X		Bill Ferguson	Garth Fagan Dance	
X		Rick Rynski	City-Neighborhood & Business Development	
X		Jeff Mroczek	City-Design	
X		Andrea Guzzetta	Chief of Staff, city Council	
X		Mark Cuddy	Geva Theatre Center	
X		Chris Kawolsky	Downstairs Cabaret Theatre	
X		Tim Palmer	Eastman Business Park	
X		Michele Gibson	Eastman School of Music	
X		Arlene Liberti	Eastman Business Park	
X		Jason Haremza	City-Planning & Zoning	
X		Thomas Warfield	RIT/ArtWalk/PeaceArt/MUCCC	
X		Dolores Kruchten	Kodak	
X		Linda Glosser	Rochester Broadway Theatre League	
X		John Parkhurst	Rochester Broadway Theatre League	
X		Sue Cotroneo	Rochester Lyric Opera	
X		Annette Ramos	Latino Theatre community	
X	x	Steven Wolff	AMS	
x	x	Danielle Boyke	AMS	
x	x	Paul Westlake	WRL	
	x	Tom Gallagher	WRL	
	x	Noah Steffes	WRL	
	x	Raymond Kent	WRL	

AUTHOR: Paul Westlake and Tom Gallagher

z:\Job Name\Rochester PAC\B Meeting and Project Info\B01 Meeting Notes\January 2016 Meetings\RPAC 2016 0114 - Stakeholder Roundtable - Meeting Notes.docx

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MEETING NOTES

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NOTE: The following meeting notes constitute our understanding of the items discussed. Unless Author is notified of any additions and/or corrections within five (5) days after receipt, the following is assumed complete and correct.

NO.:	ITEMS DISCUSSED:	ACTION REQ'D BY	TARGET DATE
1	Group reviewed that the Arts are in Rochester's DNA.		
2	Question: How do we find a solution that is in everyone's best interest?		
3	Group reviewed importance of the planned PAC facilities having both indoor and outdoor components. During summer and shoulder seasons the potential for arts related activities outdoors is significant (as evidenced by popularity of the Jazz Festival)		
4	Reviewed how concept and implementation must also drive demand		
5	Group reviewed that there would most likely be needs for: A. Dance space B. Film C. Educational component D. Flexible theater piece		
6	Currently there are (3) cabaret spaces which are spread out which is not ideal		
7	Important to explore inclusivity in the study		
8	Reviewed how at end of the day it is not really about just the performance, it is about the residents. The performances act as media to build community.		
9	Dance is looking for a venue where they could perform outside of their "home season"		
10	Group reviewed that there could be needs for: A. 1,000 seat theater B. 800 seat theater C. outdoor component D. a theater for students/educational activities E. Rehearsal space (currently identified as a barrier)		
11	Existing stage size is a significant barrier for Garth Fagan		
12	Important to consider modular growth – phasing the implementation plan is possible, even likely		
13	There are still emerging arts groups, such as new Latino theater group within last 2 years		
14	Smaller groups are desperate for a 250 seat space; in Renaissance Square scenario, the cabaret theatre was going to use this space for much of the time and the balance of the time it would be available for arts organizations. This space could also serve conventions and meetings		
15	Ten year old study exists whose points are the following: A. Rural area performers felt isolated from the arts council		

MEETING NOTES

Continued

	B. Minority arts groups and artists felt they were on the outside		
16	Study to consider integrating various demographics		
17	Consider existing infrastructure (ie arts facilities) that could be part of the arts center; the Lyric theatre can be part of this fabric; make a campus that is the nucleus of the arts. The arts center/district could also develop over time.		
18	Eastman Business Park has a theatre of 2,000 seats, a gymnasium, cafeteria, 250 seat auditorium below the 2,000 seat theatre. How do you tie this to the City? How do you leverage these assets?		
19	Group reviewed the idea of multi-facility community of arts venues. Possibly within what could be considered an arts district. This model would work well for multiple uses, including the jazz festival		
20	Reviewed the less quantitative side of seeming disparate venues. What is the value of a constellation of unique and "funky" spaces that have a personality?		
21	Group pondered that issue could be a bit of chicken and egg condition – ie what do you support in advance vs enabling growth more organically		
22	Can there be an organizational connection among the arts organizations?		
23	Reviewed that it is <u>people</u> that collaborate, not institutions		
24	Collaboration with the community is important to motivation building within the community		
25	Group reviewed that it is sometimes a constellation of facilities and continuity of activity is important; no one planet makes it work (one new piece will not solve all of it). Look at this study in a diffused or distributed way		
26	Concern was expressed about how a new facility would cannibalize existing venues, areas		
27	Reviewed need to talk to 3 major developers in town who are interested in this initiative and are investing in the community already.		
28	Reviewed potential need for a City arts commissioner		
29	There is not currently a major theater department in the academic institutions in this city - no one turning out theatre students (who may go out and form companies)		
30	Reviewed how the arts organizations and corporations may join forces to create an "arts council"		
31	Reviewed that a new black box theatre and a 1,000 seat theatre would serve to satisfy unmet needs of the Eastman School of Music. The black box would serve the needs of opera.		

MEETING NOTES

Continue

32	The Lyric Opera Company bought Christian Science Church and is creating a 1,000 seat "Lyric Theatre"		
33	There is currently no theater for dance in the community		
34	Reviewed that for Rochester to become the "City of the Arts" it needs the tools (ie facilities).		
35	Reviewed that instead of a Performing Arts Center, we need to be a Performing Arts <i>community</i>		
36	Reviewed need to not let Rochester fall behind in the arts		
	End		

Rochester Performing Arts Center Site and Facility Study

Qualitative Summary from Stakeholder Organization Interviews

April 30, 2016

The following is an interim summary of the work performed to date for the Rochester Performing Arts Center Site and Feasibility Study relative to the interviews and meetings held with the various arts and culture stakeholder organizations.

Following the January 14, 2016 "roundtable" meeting at Rochester City Hall with all stakeholder organizations, WRL and AMS conducted individual interviews with each organization. These were all held on January 15 with the exception of the RBTL interview which was held on January 14. Subsequent to these interviews in January, WRL conducted a programming meeting with the RBTL staff on February 23, 2016 and developed a target space program for a new facility that would meet the RBTL needs.

Understanding there is a need to more fully understand how the needs of each organization are met (or not) in their existing venues, with the exception of RBTL WRL met with each organization on April 14 in their existing venue. The findings from these meetings will be addressed in our upcoming review meeting relative to the further strategy and program development.

Below is the qualitative summary of the more significant items reviewed during the meetings held on January 15. These have intentionally been made more qualitative and noted out of order, and not been attributed to specific individuals or organizations. Note that some of these comments below reflect similar comments from different organizations, and some reflect the option of just one organization.

1. There is a strong interest in collaborating and sharing resources for things like ticketing and marketing.
2. There is a strong desire to enable the growing downtown residential community to walk to cultural facilities. It was noted that during Jazz fest people walk 20 minutes between venues all the time. This should not be seen as unrealistic
3. Any new facility should have a density of use throughout the week
4. The design of a new facility should be visually permeable so as to be welcoming and engaging to the community.
5. Need for rehearsal space for a full orchestra was noted.
6. Parcel 5 in Midtown block is an attractive site and may offer the best opportunity to achieve ideal shape of new performing arts facility. Needs to be studied more.
7. It will be important to make the project an attractive icon as opposed to a "box". This will help garner excitement and support.
8. It is very important to engage the younger audiences and support in the process. They are the future of the arts in Rochester
9. There is a strong desire to create meaningful arts related outdoor spaces. Consideration for developing an adjacent plaza that can be used for outdoor stage, events, outdoor cinema was suggested.
10. There is strong dialog between arts organizations already to find improved ways to collaborate. It is important to recognize and build on this dialog and energy.
11. The development of the Lyric Theater is an important element in the mix. There is some concern about close parking availability supporting the Lyric
12. It was suggested that the new PAC is planned for ancillary development – both vertically and horizontally
13. Consideration may be given to developing the 1900 seat Kodak Theater as a cinema. Other uses such as conference center, dance were noted. Has good infrastructure, "bones".
14. Need multi-purpose performing arts center that will have multiple community users
15. The need for a black box theater was expressed, with the caveat that it needs to be affordable (accessible)

Westlake Reed Leskosky

Rochester Performing Arts Center Site and Facility Study

16. Whatever is agreed to be developed, it should not be talked about or presented or be able to be perceived as being elitist.
17. Multi-use Community Cultural Center (MUCCC) was a former church and is now used frequently. Latino groups grew out of it.
18. The need for additional flexible educational space was noted.
19. There is a growing sense of pride in downtown, aligned with population and business growth.
20. The January 14 roundtable meeting was a very important step. The emerging concept of an arts entity being bigger than the sum of its parts is compelling. Reviewed how the project being more community based could enhance the private support opportunities.
21. Getting the community to say "Why wouldn't we do that" as opposed to saying "Why would we do that" is an important step in the process.
22. What is missing is connectivity and access. Things are spread out and decentralized
23. Dance was identified as a form in need of a venue.
24. There is a perception that there needs to be a new building as a lynchpin, a center, a hub for the arts community. It will likely make sense that other venue renovations should be part of the mix too.
25. The need for a 1,200 seat theater was noted.
26. There is an interest in creating more weekday programming.
27. Artwalk was developed as a strategy to connect the arts institutions and venues, and there are lessons there for the current study.
28. It was noted that there should be someone in the City that represents and advocates for Art and Culture.
29. The need for multi-form 200 to 300 seat venue was expressed. Likely end stage, and possibly serve as cinema as well.
30. Several performing groups in Rochester do not have a home and seek venues.
31. There is a sense that a rising tide will raise all arts boats, as opposed to competition between different organizations hurting each other. All organizations get along well because there is just one of each type of venue, so there is a sense that there is potential for a perfect storm of something positive.



for the Arts and
Entertainment
Industries

City of Rochester: Rochester Performing Arts Center

Economic, Demographic, and Market Analysis

June 2016

AMS Planning & Research Corp.

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Introduction

This report was prepared for Westlake Reed Leskosky and the City of Rochester to provide input into planning for a new Rochester Performing Arts Center. It is intended to explore the current market in the region and to aid in understanding the demand potential for arts programs and activities in this area.

Part I: Market Analysis

Section I: “Market Definition and Market Area Demographics” looks at the broader demographics of the population in what would be primary and secondary markets for a performing arts venue within the City of Rochester and compares it to state and national data. This section then looks at the levels of market penetration in the region.

Section II: “Consumer Segmentation and Consumption” uses the Nielsen PRIZM Premier market segmentation system to categorize the households in the Primary Market based on demographic profiles and consumer research into psychographic and consumption patterns.

Section III: “Market Penetration and Potential” evaluates the defined market area of a performing arts center within the City of Rochester to identify those regions with the largest number of potential customers based on the customer segmentation and affinities analysis.

Part II: Limitations / Impact on Activity Assessment

Documents business that cannot be accommodated at the Auditorium Theatre based on the current facility constraints and the potential benefits of a new facility.

Part III: Competitive Venue Review

Identifies and inventories existing comparable and competitive facilities in the market area to test potential impact on demand for a new downtown Performing Arts Center.

PART I: Market Analysis

Key Findings

The market analysis revealed several findings:

The market area is comprised of two segments: a primary market which is the contiguous geography that is closest to the venue and includes the first approximately 80% of customer records and the secondary market which includes the next tier of records.

The Primary Market largely mirrors the population found in the state, is more diverse, and has attained higher levels of formal education than the Secondary Market. The

Secondary Market is much less densely populated than the Primary Market. It has a lower percentage of people with at least a bachelor's degree (24.4%) compared to the Primary Market (35.8%) and is less racially diverse, with 93.7% of the population reporting as white versus 76.4% in the Primary Market.

The Primary Market has representation in all consumer segments as defined by Nielsen Prizm Premier Segmentation, whereas 32 segments are present in the

Secondary Market. The largest segment in the Primary Market (6.8% of households) is known as "Urban Modern Mix."

Households in the Primary Market area have a slightly above average propensity for participation in arts and culture activities, relative to the national average. In the Primary Market, an estimated 41% of households will attend musical theatre at least once a year, 30% will go to an art museum, and 29% will go to a paid ticketed music concert.

Methodology

In order to understand the Rochester arts market, AMS was provided with the Rochester Broadway Theatre League's (RBTL's) patron file as a proxy for current audiences to provide insight into the potential geographic reach of a new downtown performing arts center.

This file was then subjected to a process of cleaning, where duplicate records and records without identifiable U.S. addresses flagged and removed. The resulting patron file was then processed to append segmentation data using the PRIZM Premier geodemographic segmentation system, producing a finalized set of 15,387 valid records for analysis of segmentation, market penetration, and market potential.

Section I. Market Definition and Market Area

Demographics

Market Definition

The market analysis was undertaken using two distinct market areas. Data from the U.S. Census Bureau and the Nielsen Company provides a picture of the demographics of these areas. These data were compared against regional and national data. The market areas were created by mapping ZIP code penetration data from the cleaned and appended set of patron records

Primary Market Area (orange areas on the map): 52 contiguous ZIP codes comprise the Primary Market area. A Primary Market is where an organization would expect to find 75-85% of its customers.

Secondary Market Area (blue areas on map): 31 contiguous ZIP codes are included within the Secondary Market. The Secondary Market complements the Primary Market area. The Secondary Market would contain an additional 10-15% of an organization's customers.

The balance of customers are most often visitors from outside the geography or incorrectly coded records.

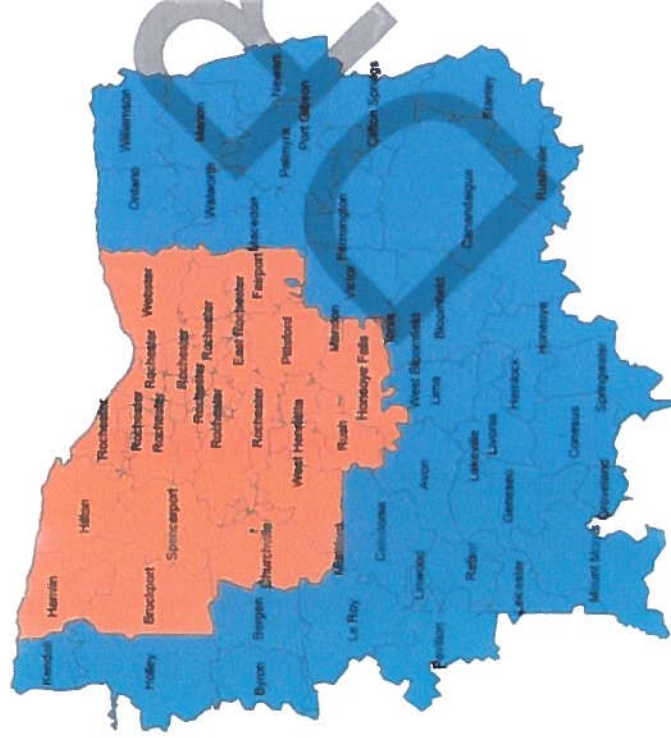
Market Demographic Summary

The 2016 population in the Primary Market is estimated to be 813,432, with an additional 163,251 people in the Secondary Market, for a Total Market population of just less than one million (976,783). Over the next five years, the population of the Primary Market is projected to grow by 1.3% and the Secondary Market by 0.2%, lower than the national rate of 3.7%.

The Primary Market population largely mirrors the population found across New York state, although with lower household incomes and a larger percentage of white residents (76.5% in the Primary Market versus 63.7% in the state).

The Secondary Market has a much smaller population than the Primary Market. It has a lower percentage of people with at least a bachelor's degree (24.4%) compared to the Primary Market (35.8%) and is less racially diverse, with 93.7% of the population reporting as white versus 76.4% in the Primary Market.

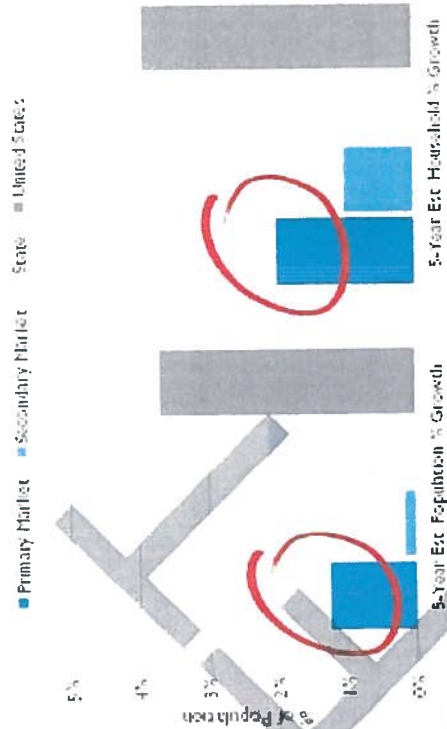
RPAC Primary and Secondary Market Area



Demographic Details

	Primary Market	Secondary Market	State	United States
Population				
2016 Estimate	813,432	163,351	19,852,987	322,431,073
2021 Projection	823,622	163,631	20,275,079	334,341,965
5-Year Est. Population % Growth	1.3%	0.2%	2.1%	3.7%
Households & Families				
2016 Household Estimate	331,701	64,684	7,543,815	122,265,437
2021 Household Projection	338,326	65,333	7,731,004	127,049,130
5-Year Est. Household % Growth	2.0%	1.0%	2.5%	3.9%
Households with People < 18	101,433	30.6%	64,684	29.9%
Population by Age				
Under 5	45,658	5.6%	7,772	4.8%
5 - 17	128,726	15.8%	23,758	14.5%
18 - 24	85,086	10.5%	17,988	11.0%
25 - 44	202,064	24.9%	35,587	21.8%
45 - 64	221,134	27.2%	49,109	30.1%
65 and Over	130,564	16.1%	29,137	17.8%
2016 Est. Average Age	39.9		41.7	39.5
2016 Est. Median Age	39.1		43.0	38.7
Population (Age 25+) by Education Attainment				
Bachelor's Degree	110,879	20.0%	16,847	14.8%
Master's Degree or Higher	87,738	15.8%	10,982	9.6%
Household Income				
2016 Est. Average Household Income	\$73,789		\$68,604	\$86,978
2021 Est. Median Household Income	\$55,606		\$56,297	\$60,445
Population Hispanic or Latino by Origin				
Hispanic or Latino	65,616	8.1%	5,821	3.6%
Population Race Class				
White	621,652	76.4%	153,048	93.7%
Black or African American	116,281	14.3%	3,714	2.3%
Amer. Indian and Alaska Native	2,403	0.3%	517	0.3%
Asian	27,274	3.4%	1,509	0.9%
Native Hawaiian and Other Pac. Isl.	282	0.3%	50	0.1%
Some Other Race	45,540	5.6%	4,513	2.8%

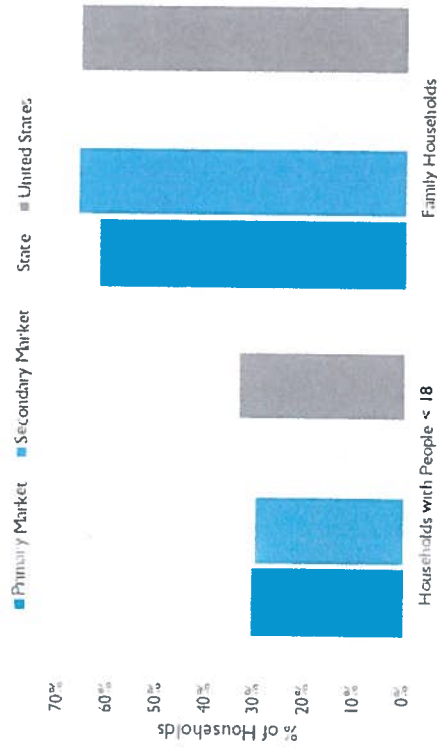
Est. 5-Year Population & Household Growth



The population in the Primary and Secondary Markets are expected to grow at rates lower than that of the state and nation.

Between 2016 and 2021, population growth of 1.3% is expected in the Primary Market, .2% in the Secondary Market, 2.1% in the state, and 3.7% in the United States.

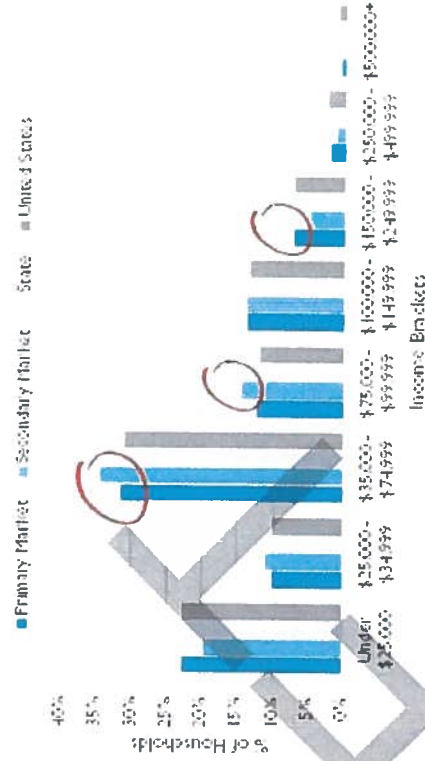
Households & Families



The Primary Market is comparable to the state and nation regarding the distribution of family households (households with one or more persons related by birth, marriage, or adoption) and households with people under 18 years of age.

In the Primary Market, 62.1% of households are family households, with a slightly higher percentage in the Secondary Market at 66.6%. These percentages are comparable to 63.4% in the state, and 66.4% in the United States.

Household Income

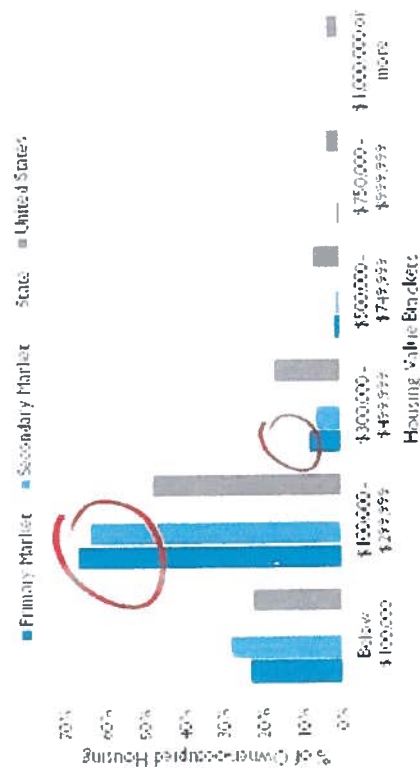


The Primary Market has a slightly higher proportion of upper income brackets compared to the Secondary Market.

22.8% of households in the Primary Market have household incomes between \$100,000 and \$500,000+ compared to 20.1% of households in the Secondary Market. The percentage of households in the Primary Market with incomes between \$35,000 and \$99,000 is 43.9%, in comparison with a higher percentage of 49.1% in the Secondary Market.

The median household income is \$55,606 in the Primary Market, \$56,297 in the Secondary Market, \$60,445 in the state, and \$55,551 in the United States.

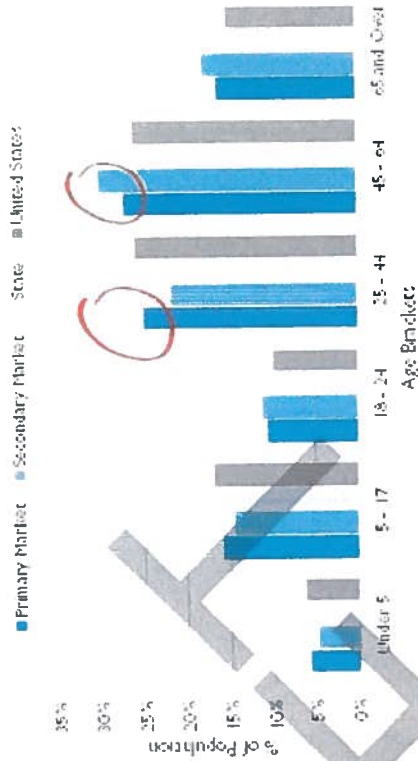
Owner-Occupied Housing Values



There is a notably larger concentration of homes valued between \$100,000-\$299,999 in both the Primary and Secondary Markets, in comparison with both the state and national percentages.

89.6% of houses in the Primary Market are valued below \$300,000, compared to 50.5% in the state and 70.3% in the United States. Only 10.4% of houses in the Primary Market are valued at \$300,000+. This is compared to 49.5% in the state, and 29.7% in the United States.

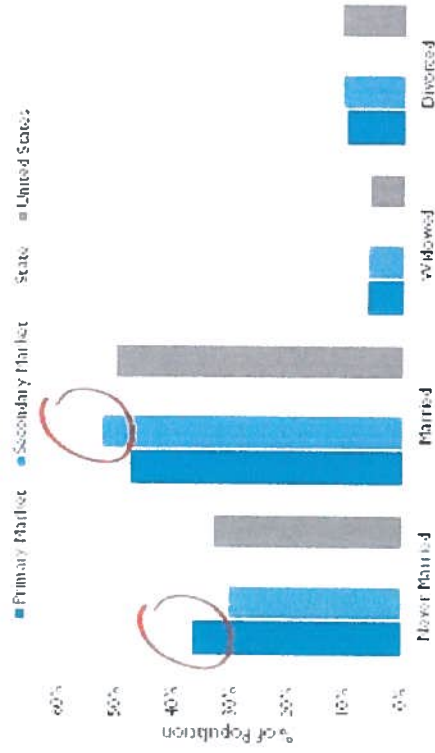
Population by Age



In the Primary Market age distribution is nearly consistent with that of the state and nation. The Secondary Market shows a slightly higher percentage of individuals aged 45 and over.

In the Primary Market, the estimated average age is 39.9 (39.1 median), compared to 41.7 (43.0 median) in the Secondary Market, 39.5 (38.7 median) in the state, and 38 (39 median) in the United States.

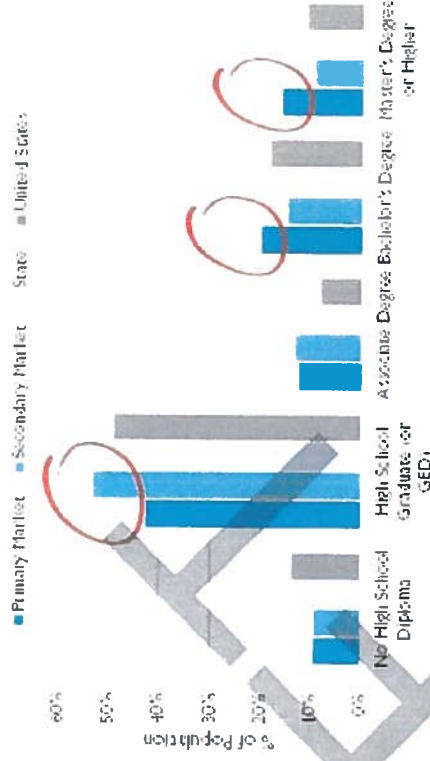
Population (Age 15+) by Marital Status



The marital status of the population in the Primary Market is similar to that of the state. The Secondary Market has a higher married population.

In the Primary Market, 47.3% of population (age 15+) is married, compared to 52.7% in the Secondary Market, 47% in the state, and 50.2% in the United States.

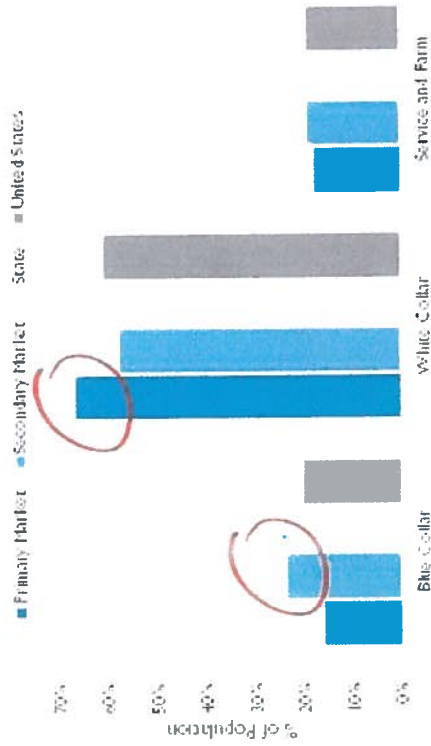
Population (Age 25+) by Education Attainment



The Primary Market contains a similar percentage of people with Bachelor's degrees with that of the state and the nation. The Secondary Market populations shows lower educational achievement.

35.9% of the population (age 25+) in the Primary Market attained a Bachelor's Degree or higher, compared to 24.5% in the Secondary Market, 33.8% in the state, and 29.4% in the United States.

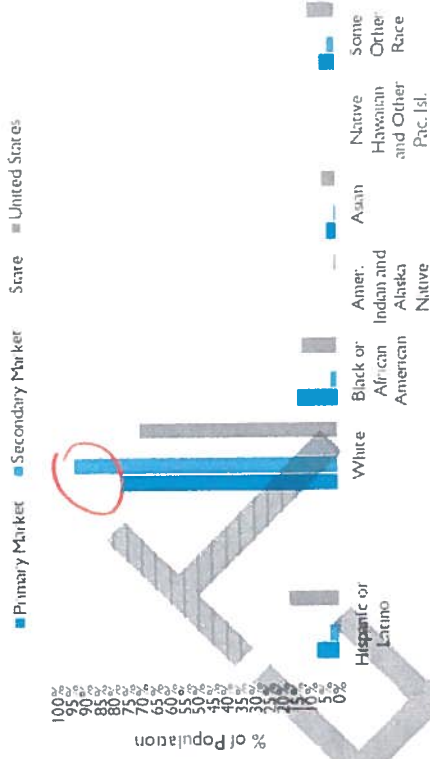
Population (Age 16+) by Occupation Classification



People in the Primary Market have a greater likelihood to work in “White Collar” occupations.

66.5% of the population (age 16+) in the Primary Market holds an occupation classified as “White Collar,” compared to 57.6% in the Secondary Market, 62.8% in the state and 60.5% in the United States.

Population by Race



The Primary Market is more diverse than the secondary market, though less diverse than the state or United States.

In the Primary Market, 23.6% of people identify as non-white, compared to 6.3% in the Secondary market, 36.2% in the state, and 29.3% in the United States.

As would be expected, residents closer to the urban core exhibit more of the characteristics generally related to arts and entertainment participation.

Section II. Consumer Segmentation and Consumption

Market Segmentation

In order to understand lifestyle behaviors of the primary and secondary markets, AMS employed the PRIZM Premier market segmentation system, developed by The Nielsen Company, to categorize the households in the Primary Market based on demographic profiles, financial behavior and consumer research into psychographic and consumption patterns.

The PRIZM Premier market profile and segmentation system is a micro-geographic consumer targeting system that segments every household in the United States into one of 68 unique clusters based on similar demographic and behavioral attributes. The clusters are ranked from 1 to 68 in order of socioeconomic affluence, taking into account factors including income, assets, age, occupation, technology usage, and family structure.

Analysis was undertaken for both the primary and secondary market areas to identify the dominant clusters. The top five ranked clusters for each market, which comprise approximately 25% of each area, are as follows:

RPAC Primary Market Area Segmentation

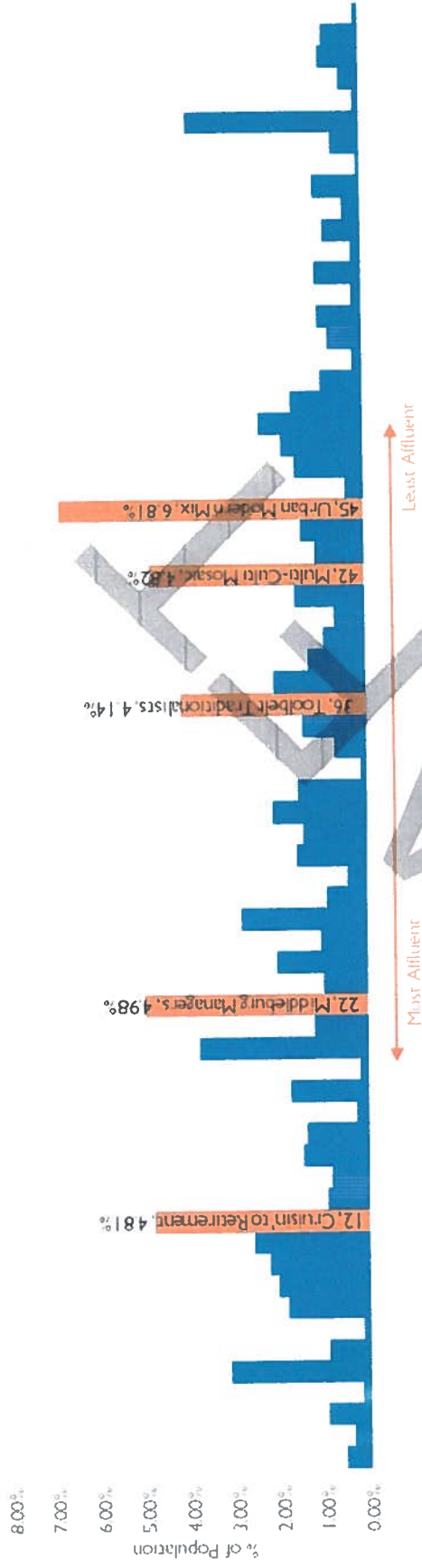
Rank	Segment	Segment Title	# of HH	% Comp.
1	45	Urban Modern Mix	22,598	6.81%
2	22	Middleburg Managers	16,506	4.98%
3	42	Multi-Culti Mosaic	15,972	4.82%
4	12	Cruisin' to Retirement	15,947	4.81%
5	36	Toolbelt Traditionalists	13,718	4.14%
Total:			84,741	25.56%

RPAC Secondary Market Area Segmentation

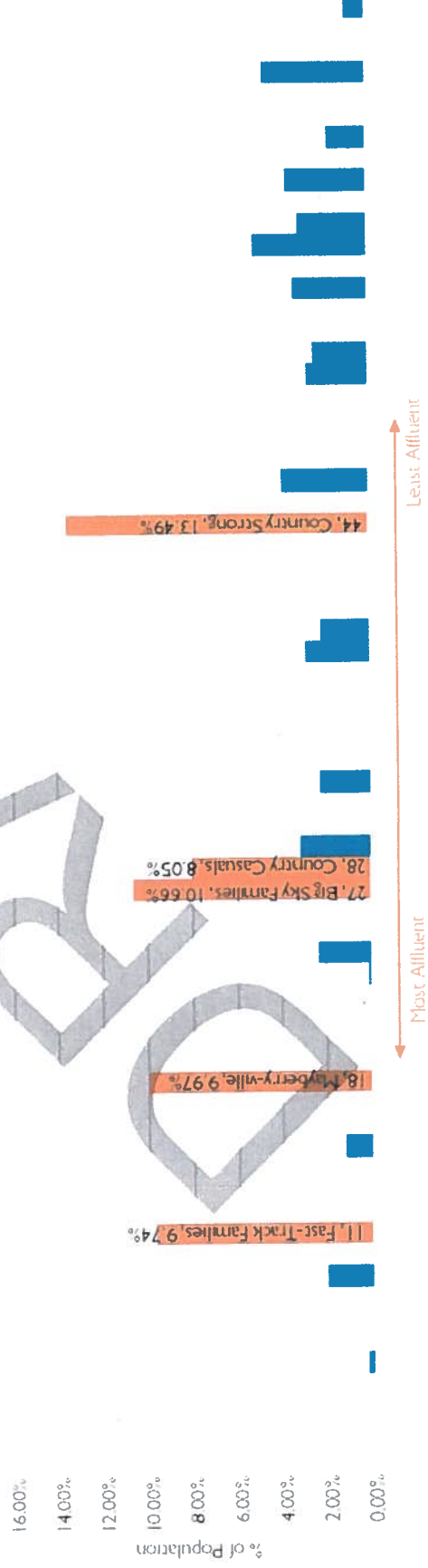
Rank	Segment	Segment Title	# of HH	% Comp.
1	44	Country Strong	8,727	13.49%
2	27	Big Sky Families	6,895	10.66%
3	18	Mayberry-ville	6,450	9.97%
4	11	Fast-Track Families	6,301	9.74%
5	28	Country Casuals	5,207	8.05%
Total:			33,580	51.91%

There is notably limited correlation between the consumer segments in the Primary and Secondary Market areas suggesting highly different propensity to consume programming. The Primary Market shows much greater diversity of consumers, with all 68 segments represented, whereas only 32 segments are present in the Secondary Market.

PRIZM Clusters (Primary Market)



PRIZM Clusters (Secondary Market)



The following are descriptions of the top five segments in the Primary Market.¹



“Urban Modern Mix” households comprise 6.8% of all households, and are 3.3 times as concentrated in the Primary Market than in the United States:

In Urban Modern Mix, lower-middle class singles and couples reside in ethnically diverse neighborhoods in or near the city center. Despite only average overall technology use, they are frequent online shoppers for everything from jeans to groceries.



“Middleburg Managers” households comprise 5.0% of all households and are 2.0 times more concentrated in the Primary Market than in the United States:

Middleburg Managers arose when empty nesters settled in satellite communities, which offered a lower cost of living and more relaxed pace. Today, segment residents tend to be middle class with solid white collar jobs or comfortable retirements. In their older homes, they enjoy reading and needlecrafts, while time outside the home is spent at club activities and cultural events.



“Multi-Culti Mosaic” households comprise 4.8% of all households and are 2.9 times more concentrated in the Primary Market than in the United States:

An immigrant gateway community, Multi-Culti Mosaic is the urban home for a mixed populace of Hispanic, Asian, and African-American singles and families. This segment is characterized by many first-generation Americans who are striving to improve their economic status.



“Cruisin' to Retirement” households comprise 4.8% of all households, and are 2.0 times as concentrated in the Primary Market than in the United States:

With their children mostly grown and out of the house, these older couples are Cruisin' to Retirement. They remain in the neighborhoods where they raised their families, enjoying the suburban lifestyle and vacationing often.



“Toolbelt Traditionalists” households comprise 4.1% of all households and are 1.7 times more concentrated in the Primary Market than in the United States:

Like many other older segments, Toolbelt Traditionalists have empty nests. If something needs to be fixed, they are likely to do the work themselves with their own power tools or paint. They are also frequent QVC and HSN shoppers.

¹ Complete descriptions of PRIZM Premier clusters can be found at: <https://segmentationsolutions.nielsen.com/mybestsegments>

Market Consumption

AMS uses Nielsen PRIZM Premier to analyze market area attitudes, product and brand preferences, media consumption habits, and demographic and lifestyle characteristics.

Affinities

To better understand the market area's product and service preferences, PRIZM Premier profiles are indexed against the profiles of consumers of products and services in categories such as Television Viewership, Radio Media Usage, Sports & Leisure Activities, Travel, and Psychographic profiles.

The table which below indicates how much more likely households in the market area are to participate in each interest, behavior or activity in comparison to the national average. Lifestyle attributes with an index of more than 100 (average United States household = 100) indicate that households within the market area are more likely to possess an attribute compared to the average US household profile.

This report focuses on affinities related to arts, culture, and entertainment consumption. Residents of the Primary Market area are somewhat more or less likely than the national average to attend arts and culture related events as detailed below:

Lifestyle Attributes (National Average = 100)		INDEX Primary Market	INDEX Secondary Market
In the last year...			
Attended a Comedy Club		113	72
Contributed to Arts/Cultural Organizations		112	77
Listened to Public Radio		112	67
Attended a Symphony or Opera Performance		111	79
Attended a Rock Concert		111	84
Visited an Art Museum		111	71
Attended Live Theater		111	88
Listened to Classical Radio		111	62
Listened to Jazz Radio		111	35
Attended a Dance or Ballet Performance		110	86
Attended Paid Music Concert		109	91
Attended an R&B/Rap/Hip-Hop Concert		107	56
Watched the Tony Awards		106	73
Watched PBS		105	94
Played a Musical Instrument		105	97
Attended the Circus		103	90
Did Photography		101	103
Attended a Country Music Concert		95	132

Participation

Within the Primary Market itself, the PRIZM Premier profiles can be used to estimate the percentage of households that will participate in these arts, culture, and entertainment activities. In the Primary Market Area:

- An estimated 41% of households are inclined to attend live theatre at least once during a single year.
- An estimated 30% of households are inclined to attend an art museum at least once during a single year.

- An estimated 29% of households are inclined to attend a paid ticketed music concert at least once during a single year.

Section III. Market Penetration and Potential

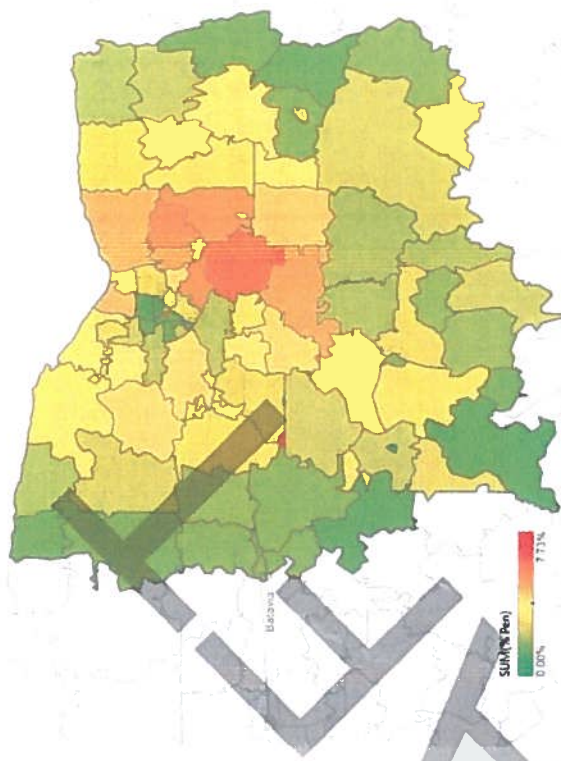
Market Penetration

A market penetration analysis details the number of households in the patron file located in a given ZIP code as compared to the total number of households in that ZIP code. The Actual Penetration Index (API) for the ZIP code indicates the penetration for that ZIP code relative to the average for the market. The average penetration index equals 100.

The following are the top 10 ZIP Codes across the Total Market by penetration:

ZIP Code	Name	Base HHs	Analysis HHs	HHs Penetration	API
14511	Mumford, NY	181	14	7.73%	230
14506	Mendon, NY	456	30	6.58%	196
14534	Pittsford, NY	12,294	774	6.30%	187
14614	Rochester, NY	132	8	6.06%	180
14526	Penfield, NY	8,372	461	5.51%	164
14618	Rochester, NY	8,577	462	5.39%	160
14450	Fairport, NY	17,317	914	5.28%	157
14472	Honeoye Falls, NY	3,426	173	5.05%	150
14625	Rochester, NY	4,537	228	5.03%	149
14475	Ionida, NY	84	4	4.76%	142

The following map shows the geographic breakdown of penetration levels within the Total Market:



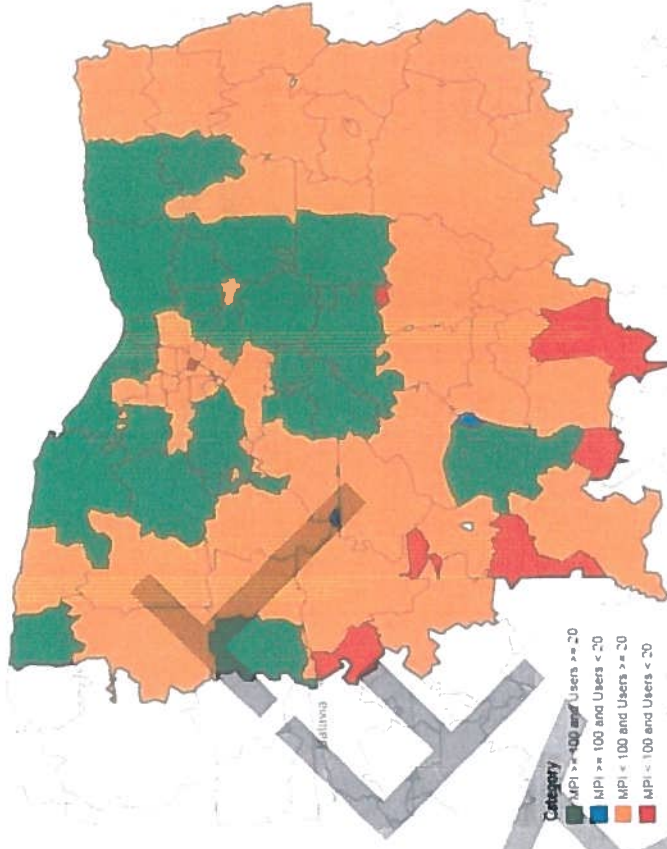
Market Potential

In order to gauge market potential, each ZIP code in the market was analyzed, based on its PRIZM Premier profile, for its potential to contain households predisposed to participating as a potential audience member, regardless of existing barriers to attendance. By comparing the profiles of each ZIP code to the profiles of households in the overall analysis group in the patron file, it is possible to compute a "Market Potential Index" (MPI) for each ZIP code in the market. An index of 100 means that the ZIP code has average potential to contain households similar to those in the current audience base.

The following table presents the 20 ZIP Codes with MPIs over 110. These ZIP codes have the highest potential (compared to other in the market area) to contain households that may be interested in participating in arts programs or activities.

ZIP Code	Name	Base HHS	MPI
14534	Pittsford, NY	12,294	178
14526	Penfield, NY	8,372	150
14450	Fairport, NY	17,317	147
14506	Mendon, NY	456	145
14564	Victor, NY	5,994	141
14618	Rochester, NY	8,577	141
14625	Rochester, NY	4,537	139
14580	Webster, NY	21,132	139
14543	Rush, NY	1,178	129
14511	Mumford, NY	181	124
14617	Rochester, NY	9,623	122
14626	Rochester, NY	12,849	121
14559	Spencerport, NY	6,875	120
14610	Rochester, NY	7,112	119
14468	Hilton, NY	7,174	118
14624	Rochester, NY	14,976	114
14472	Honeoye Falls, NY	3,426	114
14467	Henrietta, NY	3,899	113
14612	Rochester, NY	14,681	113
14519	Ontario, NY	4,646	112

The following map shows the geographic breakdown of market potential within the Total Market:



PART II: Auditorium Theater Limitations / Impact on Activity

Methodology

In order to complete the assessment, AMS and VRL toured the Auditorium Theatre facility and conducted interviews with RBTL leadership and staff, promoters, and rental partners that currently utilized the venue for touring Broadway productions, concerts, comedy, and other presentations. Note that neither formal architectural nor structural evaluations were commissioned as part of this study, so building condition is based on WRL's venue observations and data as reported by users of the facilities.

Current Conditions

The various ways that the Auditorium Theatre facility itself affects or constrains the operations of RBTL and the rental partners that utilize the facility falls into three categories: the building structure itself, the patrons who consume cultural and educational activities at the facility, and the product that is available to those audiences.

The Building

The Auditorium Theatre is currently owned and operated by the Rochester Broadway Theatre League (RBTL) who purchased the facility in 2004. Since that time, RBTL has completed minor stage renovations and major public area renovations in order to continue its current type and quantity of activity.

The main venue has a seat count of 2,464, with support spaces for performers, administrative offices, a public lobby, and a public lounge.

Based on WRL's assessment of the facility, structural limitations include:

- No air conditioning, which limits summer activity; The venue is dark for two months each summer;
- Inadequate parking and lobby space, which burdens preshow and intermission services and logistics;
- The existing loading area is open, exposing building interiors, scenery, equipment to the elements
- The loading dock is not at the level of the stage floor, requiring portable ramps that are less than ideal for efficient loading operations
- Limited storage in the loading area requires road cases and equipment to be stored in the hallway against fire code; This requires the venue to engage a fire marshal to monitor the area for all affected performances, contributing to production costs
- The current backstage flow, including confusing hallway layouts, limited proximity of rooms with related functions, and inadequate lifts to transport wardrobe cases and personal affects to dressing rooms, hinders efficient operations and adds labor, increasing production-related costs;
- There are no light bridges or catwalks in the audience chamber to utilize for front of house lighting, sound, and rigging positions;
- The stage floor does not meet live load requirements and needs additional structural reinforcement below the stage;
- The venue has no control over the limited parking in the area.

The Patrons

Interviews with stakeholders, staff, promoters, and patrons indicate that the Auditorium Theatre attracts audiences primarily based on

the quality of its programming, as opposed to attending because of the experience at the venue. Patrons go to see a specific show, which happens to be at the Auditorium, as opposed to looking at the Auditorium as a destination itself and then looking to see what is playing there. This places more emphasis on the programming itself to attract patrons to the venue., and gives RBTl and its rental partners less opportunity to take risks on lesser known touring artists or productions.

There is anecdotal evidence that the Rochester market is good for touring music, with little crossover of patrons between Rochester and other regional markets. It was stated by interviewees that market demand for theatre and cultural events is shifting to more big name productions and performers, with lessening demand for lesser-known touring shows.

The patron experiences at the Auditorium Theatre is constrained by the limited parking, general lack of restaurants and other amenities, such as shopping, attractions, and nightlife, in the immediate neighborhood, and the inadequate square footage of the lobby as noted by WRL which occasionally causes patrons to have to wait outside before a performance if the auditorium is unable to open on time due to technical delays by the touring act. The facility is not perceived as either a gathering place or destination for the community.

The Product

The primary constraint for agents and presenters that utilize the Auditorium Theatre is the seat count. At 2,464 seats, the venue is slightly smaller than other venues in the upstate New York area. The seat count limits the gross potential (the number of seats multiplied by ticket price) for a performance in the venue. The lower gross potential does not necessarily limit the number of

performances, but affect the nature of the product which goes to the best available and most appropriate sized venue. The lower gross potential, however, does make it more difficult to bring in higher-end performers and first-run Broadway productions, that could potentially sell more tickets than the venue can accommodate, early in their touring schedules.

Central to the current access to high-quality programming that takes place at the Auditorium Theatre are the strong relationships built-up between the promoters that use the space, the agents they work with, as well as the high-quality staffing provided by RBTl at the venue. Should any of these variables shift, the facility's programming may be at risk.

Opportunities with a New Facility

A new downtown Performing Arts Center would provide the several opportunities to relocate current programming from the Auditorium Theatre or generate new programming in a new facility:

- A new facility would have a significantly higher standard of patron and artist amenities; making the venue itself a destination.
- A longer projected life-span would reduce the costs of repair and replacement compared to the Auditorium Theatre in its current condition and configuration;
- The presence of air conditioning would increase dates available for programming; Summer programming has provided to be an opportunity to drive new activity and revenue at PACs nationally.
- A better patron experience could drive increased attendance and encourage civic pride in the facility;
- Structured parking would ease the current parking burden;

- A dedicated loading dock, improved backstage flow, and dedicated storage areas for scenery, equipment, and costumes could reduce labor time and production costs resulting in better financial performance;
- Additional seating could help to attract higher quality artists and touring presentations sooner and potentially in a higher volume;
- New ancillary spaces could support current and additional performances and educational programs offered by area performing arts organizations.

Considerations with a New Facility

The following items should also be considered when and if planning for a new facility:

- There will be an increase in operating costs for building operations and staffing due to a larger square footage, a higher standard of care, and increased activity.
- Financial support may be needed if a new facility is intended to support an increased level of mission-driven activity from community partners.
- Potential operating and activity partners will need to be identified and should be engaged more fully in the design and planning process to assure the new facility meets the needs of intended users. Partnership agreements would need to be formulated to assure intent between the city and partner organizations.
- Should all activity move from the Auditorium Theatre to a new facility, the existing structure could become competition for the new venue at a lower use cost. It is unlikely the market could support two facilities of this size offering similar programming.

Part III: Competitive Venue Review

Methodology

In order to understand the opportunity for a new facility and determine any potential impact on or from the competitive environment, AMS assembled relevant data on facilities in two categories:

Rochester Competitive Market: Venues between 100 and 5,500 seats within 15 miles of downtown Rochester.

Regional Competitive Market: Venues between 100 and 5,500 seats between 15 miles and 250 miles from downtown Rochester that would have an impact on audiences and access to regional touring activity.

The venues included in the analysis are those that compete for either potential rental activity, patron dollars, or for touring product (i.e. artists and performance groups). Bars and restaurants were not included unless able to offer ticketed performances on a regular basis.

Competitive Market

There are a variety of facilities available for arts and cultural activity in Rochester and the adjoining markets. AMS identified 35 venues within 15 miles of the downtown Rochester area. 18 of these are key venues that host, present, or produce activity that may compete with a new downtown performing arts center for patron dollars or product. Regionally, AMS identified an additional 25 venues between 15 and 250 miles of downtown Rochester. 11 of these are key venues that host, present, or produce activity that may compete with a new downtown performing arts center for patron dollars or product.

Important factors regarding the competitive market for a new downtown performing arts center would be:

- Locally, most of the venues in the area (detailed in the two tables which follow) currently accommodate rental activity for a variety of performing arts and cultural organizations and event operations taking place in Rochester; However, according to their users, many of the venues are not ideal in terms of size, technology, or availability for the type of programming that would take place in a new performing arts center. Activity at these venues, however, would compete for patrons and patron dollars with a new performing arts center.
- There is strong evidence that a new venue would increase the overall market for arts and cultural activities, positively benefiting the market as a whole. Recent examples in Orlando (opened 2014) and Salt Lake City (opening 2016) demonstrated nearly 100% growth in Broadway subscribers for example, substantially increasing the market for

Broadway programming and extending the number of productions dramatically.

- Regionally, it is a competitive market for hosting or presenting touring product; particularly the ability to book artists to play at the facility. When determining where a touring act will play, a key factor for agents and touring artists is the gross potential of the venue (the amount of potential ticket sales before expenses) and the nature of the extant relationship with local promoters and operators. Larger venues in nearby markets currently compete with Rochester venues for major touring artists. These markets are more likely to get first runs of touring theatre performances and musical artists given the capacity to sell additional tickets. A new performing arts center would enhance Rochester's competitiveness while recognizing that expanded programming represents increased risk.

Venue Detail

Venues in the Rochester and Regional market areas are detailed in the charts following:

Map 2: Regional Area Venues (key venues indicated in green)

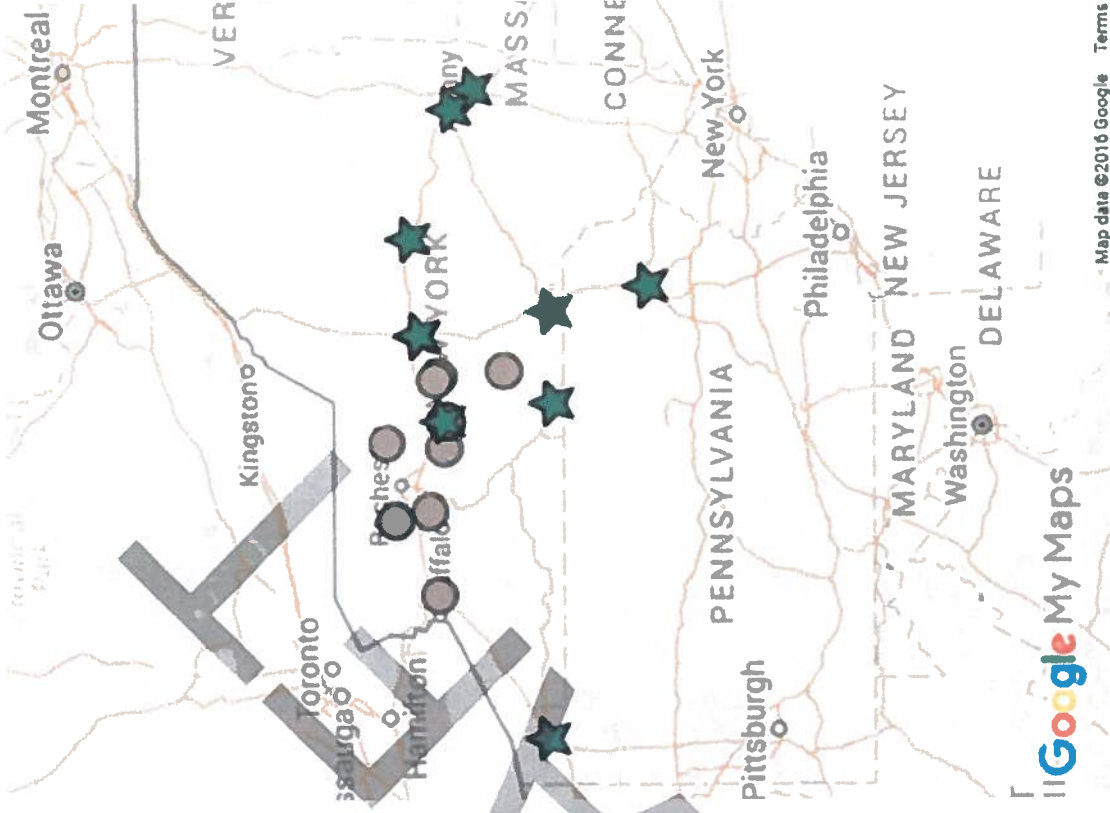
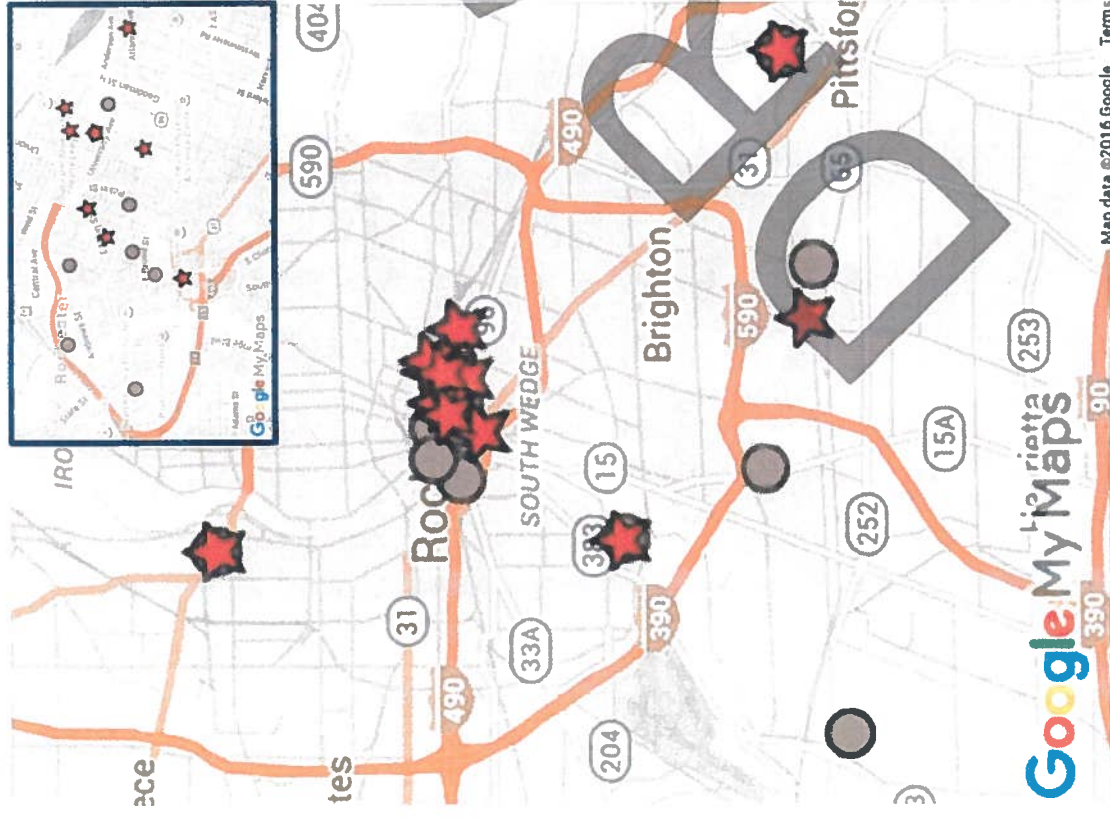


Chart 1: Rochester Area Venues

KEY VENUES < 15 MILES	Location	Seats	Dist.
Main Street Armory	Rochester	5,000	2 mi.
Eastman School of Music - Eastman Hall	Rochester	3,094	1 mi.
Rochester Auditorium Theater	Rochester	2,464	1 mi.
Kodak Center for the Performing Arts - Executive Theatre	Rochester	1,964	3 mi.
Nazareth College Arts Center - Callahan Theatre	Rochester	1,000	8 mi.
Strong Auditorium	Rochester	1,000	3 mi.
Lyric Theatre	Rochester	900	1 mi.
Geva Theatre Center - Elaine P. Wilson Stage	Rochester	552	1 mi.
Rochester School for the Arts - Allen Main Stage	Rochester	545	2 mi.
Eastman School of Music - Kilbourn Hall	Rochester	455	1 mi.
Rochester School for the Arts - Ensemble Theater	Rochester	227	2 mi.
Jewish Community Center - Alfred & Ida Hart Theatre	Rochester	288	8 mi.
Downstairs Cabaret - Winton Place	Brighton	200	9 mi.
Geva Theatre Center - Ron & Donna Fielding Stage	Rochester	180	1 mi.
Blackfriars Theater	Rochester	125	1 mi.
Downstairs Cabaret - Windsor Street	Rochester	100	1 mi.
Downstairs Cabaret - East Main Street	Rochester	100	1 mi.
Multi-use Community Cultural Center (MuCCC)	Rochester	90	2 mi.

OTHER VENUES < 15 MILES	Location	Seats	Dist.
Harro East Theatre & Ballroom	Rochester	1,000	1 mi.
Anthology	Rochester	1,000	1 mi.
Hochstein Music School Performance Hall	Rochester	857	1 mi.
Water Street Music Hall	Rochester	800	1 mi.
Xerox Auditorium	Rochester	625	1 mi.
Monroe Community College - Brighton Campus Theater	Rochester	568	4 mi.
RIT/NTID - Ingle Auditorium	Rochester	505	7 mi.
RIT/NTID - Panera Theater	Rochester	500	7 mi.
Hubbell Auditorium	Rochester	500	3 mi.
Memorial Art Gallery M&T Ballroom	Rochester	477	2 mi.
Montage Music Hall	Rochester	300	3 mi.
Memorial Art Gallery Auditorium	Rochester	296	2 mi.
Nazareth College Arts Center - Peace Theater	Rochester	190	8 mi.
Nazareth College Arts Center - Masters Family Community Theater	Rochester	180	8 mi.
Kodak Center for the Performing Arts - Studio Theatre	Rochester	180	3 mi.
Rochester School for the Arts - Black Box	Rochester	100	2 mi.
The Little Theatre	Rochester	n/a	1 mi.

Chart 2: Regional Area Venues

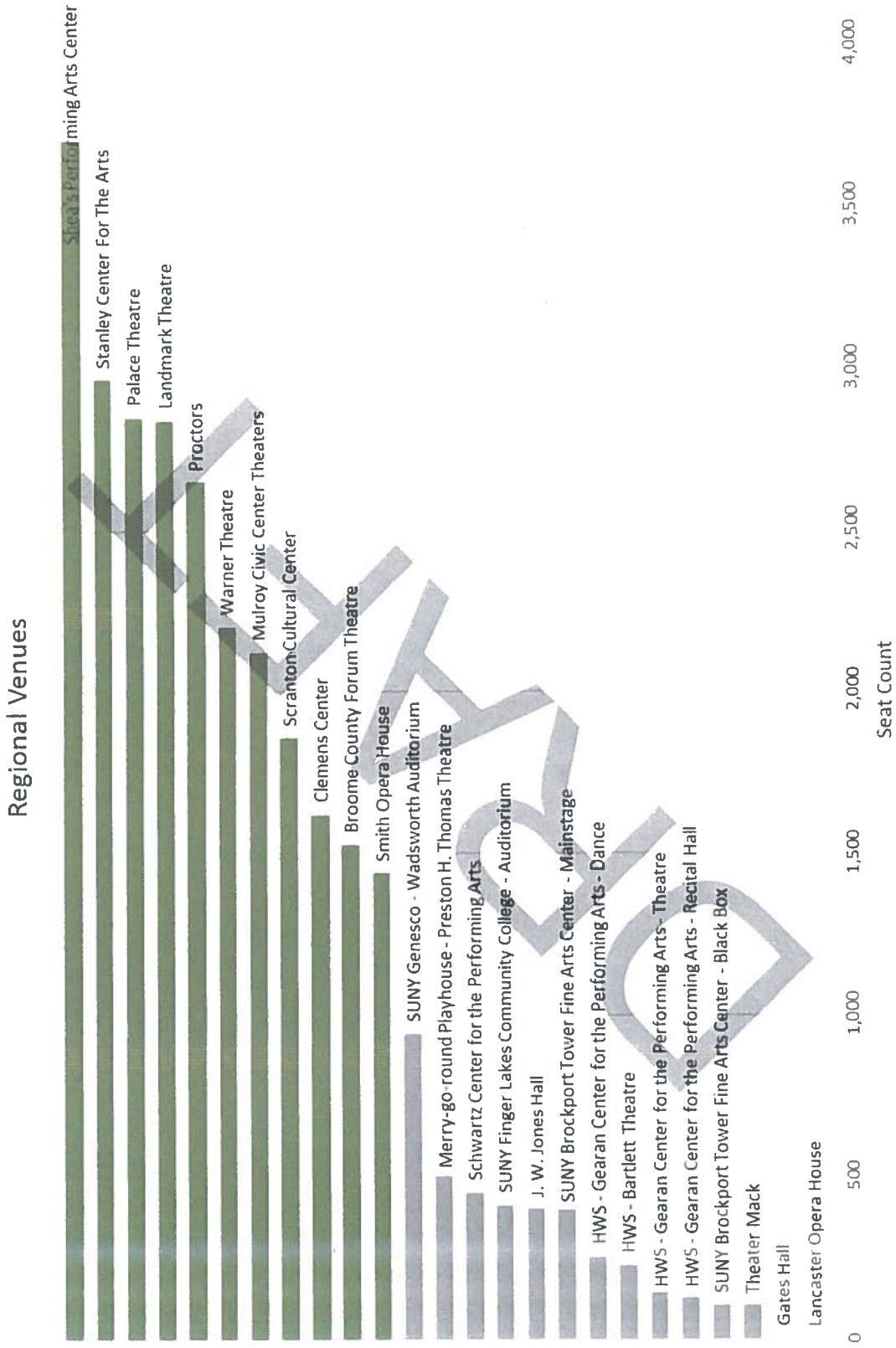
KEY VENUES > 15 MILES	Location	Seats	Dist.
Shea's Performing Arts Center	Buffalo	3,700	73 mi.
Stanley Center For The Arts	Utica	2,963	136 mi.
Palace Theatre	Albany	2,844	226 mi.
Landmark Theatre	Syracuse	2,834	87 mi.
Proctors	Schenectady	2,646	209 mi.
Warner Theatre	Erie, PA	2,196	161 mi.
Mulroy Civic Center Theaters	Syracuse	2,117	88 mi.
Scranton Cultural Center	Scranton, PA	1,856	217 mi.
Clemens Center	Elmira	1,618	106 mi.
Broome County Forum Theatre	Binghamton	1,525	160 mi.
Smith Opera House	Geneva	1,438	45 mi.

OTHER VENUES > 15 MILES	Location	Seats	Dist.
SUNY Genesco - Wadsworth Auditorium	Genesco	938	36 mi.
Merry-go-round Playhouse - Preston H. Thomas Theatre	Auburn	501	66 mi.
Schwartz Center for the Performing Arts	Ithaca	450	91 mi.
SUNY Finger Lakes Community College - Auditorium	Canandaigua	409	31 mi.
J. W. Jones Hall	Caledonia	400	24 mi.
SUNY Brockport Tower Fine Arts Center - Mainstage	Brockport	399	19 mi.
HWS - Gearan Center for the Performing Arts - Dance	Geneva	250	47 mi.
HWS - Bartlett Theatre	Geneva	225	47 mi.
HWS - Gearan Center for the Performing Arts - Theatre	Geneva	140	47 mi.
HWS - Gearan Center for the Performing Arts - Recital Hall	Geneva	125	47 mi.
SUNY Brockport Tower Fine Arts Center - Black Box	Sweden	100	19 mi.
Theater Mack	Auburn	100	62 mi.
Gates Hall	Pultneyville	n/a	30 mi.
Lancaster Opera House	Lancaster	n/a	67 mi.

Chart 3: Rochester Area Venues by Capacity



Chart 4: Regional Area Venues by Capacity



Executive Summary – Option 1

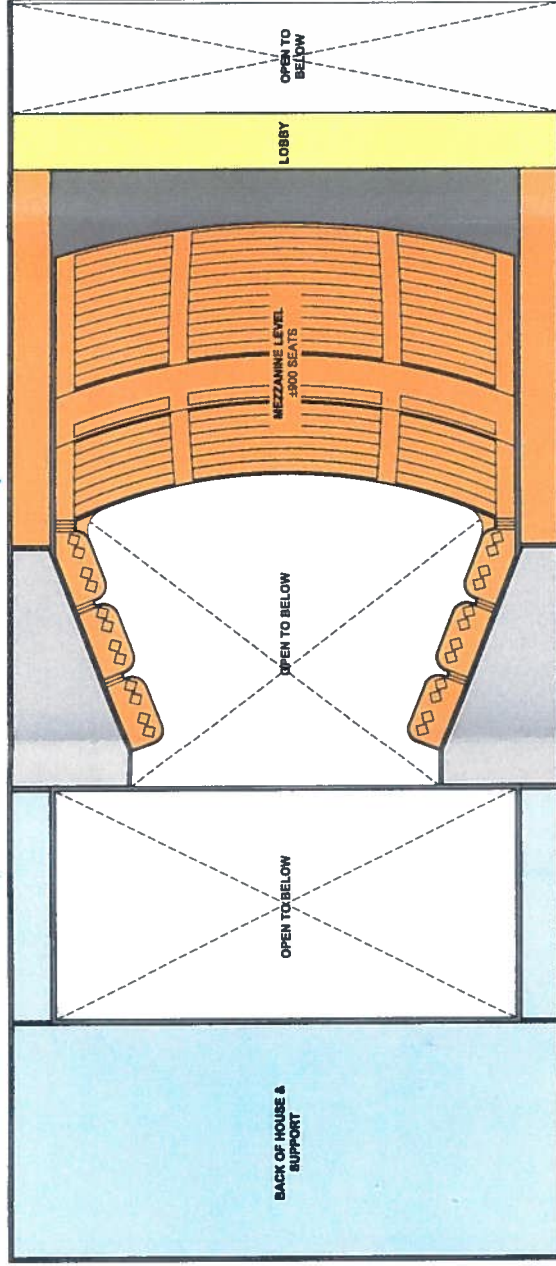
As per earlier studies, the feasibility for a new larger Broadway theater to house the Rochester Broadway Theater League (RBTL) was considered in this current study. A review of the existing Auditorium facility with RBTL leadership yielded a good understanding of the limitations of the existing facility and a summary of Deficiencies & Lost Revenue Opportunities was prepared as part of the Market Analysis within Tab 2. Subsequently more detailed interviews with RBTL staff were conducted and a detailed space program for a new hall was developed. The seat count of the ideal hall was identified as falling between 2,700 and 3,000 seats, and 2,850 seats was used for this study. As per review with the City, Option 1 would need to include as much of the 700 parking spaces required on the site as possible.

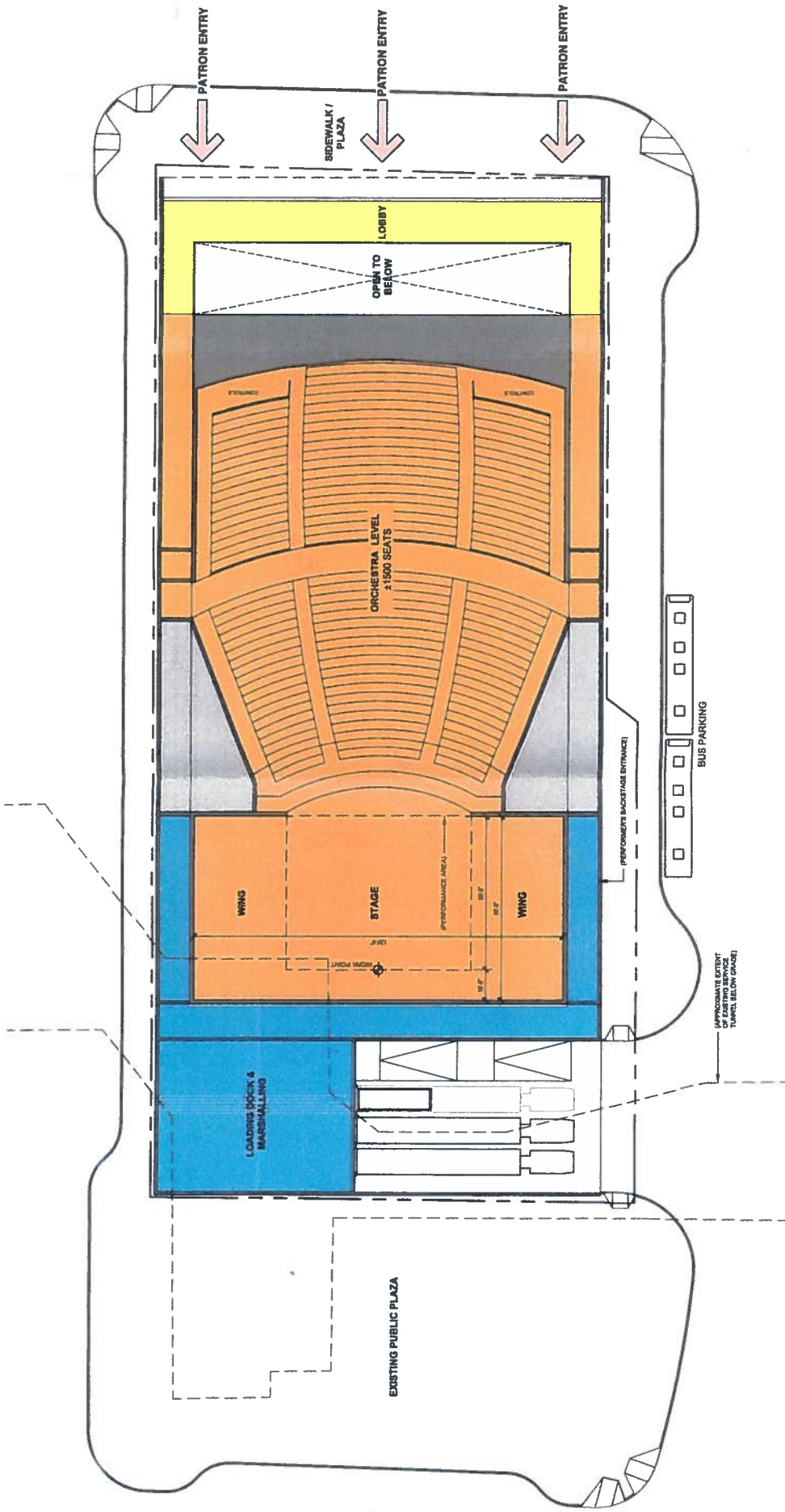
The consulting team then developed test fits of the Option 1 program on all 17 sites and reviewed with City leadership the pros and cons of this scope for the new Rochester Performing Arts Center (RPAC) on each site. Ultimately Site #10 (Parcel 5) was identified as the most ideal location for the new RPAC with the Option 1 program. This site is "shovel ready" with easy access to utilities and a low risk for unknown conditions. This site also provides an ideal downtown location in close proximity to other arts organizations. Tab 3 item e provides more detail relative to this specific site. Due to the elevation of bedrock approximately 110 spaces of the required 700 spaces can be accommodated on the site.

The preliminary planning layout for this revised Option 1 as conceived by the WRL team accents the north façade of the Rochester Performing Arts Center along Main Street as a feature element employing tall glass lobby walls so as to be inviting to the public and allow views of the performance "vessel" within. This revised scheme employs a public plaza to the north of the lobby space which allows performance activities in the warmer months that could supplement the program activities of the Performing Arts Center. A similar glass wall is used on the south façade facing Elm Street and the existing public plaza to allow views into select rehearsal and performer common spaces above the grade level. This echoes the architectural language of the north façade facing Main Street, and helps ensure that all sides of the facility actively engage the streets surrounding this site.

Using the WRL preliminary design, an opinion of probable project cost of approximately \$75 million has been estimated for the construction of the Option 1 program as developed on Site #10.

Date	2/23/2016					REVISED 041116 RAK
Program Study	City of Rochester					REVISED 042716 RAK
Theatre Name	Rochester Performing Arts Center					
Theatre Location	Rochester, NY					
Prepared By:	Westlake Reed Leskosky					
		2016-FEB PRELIMINARY Program				
	ITEM NAME	# OF UNITS	UNIT TYPE	SQ FT/ UNIT	NET AREA (SF)	Notes
Public Spaces	Public lobby	2850	Each	7	19,950	Circulation portion in grossing
	Audience chamber sound + light locks	6	Each	150	900	
	Concessions with storage - orch level	1	Each	250	250	
	Concessions with storage - balc level	2	Each	150	300	
	House Manager	1	Each	80	80	
	Box office - sales	4	Each	35	140	
	Box office - manager's office	1	Each	120	120	
	Public restrooms - male	60	Toilets	36	2,160	
	Public restrooms - female	80	Toilets	58	4,640	
	Public unisex / family restroom	8	Each	80	640	
	Ushers' room / storage	1	Each	150	150	
	Private Audience Room	1	Each	100	100	For emergencies
	Cry Room	1	Each	120	120	For Special Needs Patrons
	Front of house storage	1	Each	120	120	
	Visit company merchandise storage	1	Each	80	80	
	Visiting Company Merchandising Sales	1	Each	200	200	
	Audience elevator	1	Each	0	-	part of grossing
	Coat check	250	Each	1	250	
	Subtotal				30,200	
Perf. / FOH Spaces	Audience chamber	2850	Each	11.5	32,775	
	Stage	1	Each	3600	3,600	60'w x 60'd
	Stage wings	2	Each	1800	3,600	30'w x 60'd
	Stage apron	1	Each	400	400	80'w x 5'd
	Orchestra pit	20	Musicians	17	340	
	ADA Lift to Orchestra Pit	0	Each	0	-	part of grossing
	Amplifier rack room incl transformer	1	Each	120	120	
	Lighting / sound control booth	1	Each	320	320	
	Followspot booth (4 followspots)	1	Each	300	300	
	ADA Lift to Control Booth	1	Each	-	-	part of grossing
	House tech mix - sound/lights/video	1	Each	250	250	
	Subtotal				41,705	
Stage Support	Orchestra shell storage (15 towers)		Each		-	Not In Scope
	Piano storage	1	Each	120	120	
	Marshaling / dead case storage	1	Each	1200	1,200	Adjacent to Dock
	Pit storage (roofs, stands, chairs)	1	Each	150	150	
	Musician / Choir Holding	50	Musician	7	350	Larger groups share choir dressing
	Visiting stage manager's office	1	Each	120	120	
	Visiting company manager's office	1	Each	100	100	
	Backstage ADA restroom (single user - any)	4	Toilets	60	240	
	Backstage ADA restroom (female)		Toilets	60	-	
	Dimmer room	1	Each	120	120	
	Lighting storage	1	Each	240	240	
	Sound storage	1	Each	150	150	
	Misc. backstage storage	1	Each	300	300	
	Catwalk Level	1	Each	400	400	
	Crew room	1	Each	400	400	
	Reaper shop including office, tool storage, material storage	1	each	1000	1,000	
	Subtotal				4,890	
Performer Support	Chorus (10 person) dressing rooms w/ toilet + shower				-	
	Chorus (12 person) dressing rooms w/ 2 toilets + 2 showers	2	Each	500	1,000	
	Chorus 15 person) dressing rooms w 3 toilets + 3 shower	2	Each	750	1,500	
	Principal (1-4 person) dressing rooms w / toilet + shower	4	Each	250	1,000	
	Star dressing rooms w/ toilet + shower	4	Each	200	800	
	Make-up Room	1	Each	200	200	
	Wig / Hair Room	1	Each	200	200	
	Quick change and toilet	2	Each	80	160	
	Wardrobe including laundry	1	Each	500	500	
	Green room / performers' lounge with canteen/vending	1	Each	400	400	
	Catering/warming kitchen	1	Each	160	160	
	Elevator, back stage	1	Each	-	-	part of grossing
	Dance rehearsal room	1	Each	2000	2,000	
	Multi-purpose room	1	Each	1500	1,500	
	Rehearsal Room (size of stage)	1	Each	3600	3,600	
	Subtotal				13,020	
Services	Housekeeping closet	5	Each	30	150	
	Mechanical room	1	Each	-	-	part of grossing
	Electrical rooms	1	Each	1200	1,200	
	Backstage waiting	1	Each	150	150	
	Backstage security / doorman	1	Each	80	80	
	Fire panel / telephone switch	1	Each	-	-	part of grossing
	IT Server Room	2	Each	100	200	
	Truck dock / loading dock	1	Each	800	800	Interior area
	Subtotal				2,580	
Administration	Office - Administration Staff - Director, Asst, Mktg, Ops, Sales	1	Each	5000	5,000	
	Office - Technical Director	1	Each	100	100	
	Office - Stage Dept Heads	2	Each	100	200	
	Office Conference Room	1	Each	500	500	
	Office Break Room	1	Each	200	200	
	Office - Locker Room/Shower	1	Each	500	500	
	Office - Security / Usher Head	2	Each	100	200	
	Subtotal				6,700	
	Total net area				99,095	
	Multiplier				1.45	
	Gross area				143,688	





Westlake
Reed
Leskosky

CITY OF ROCHESTER DOWNTOWN PAC

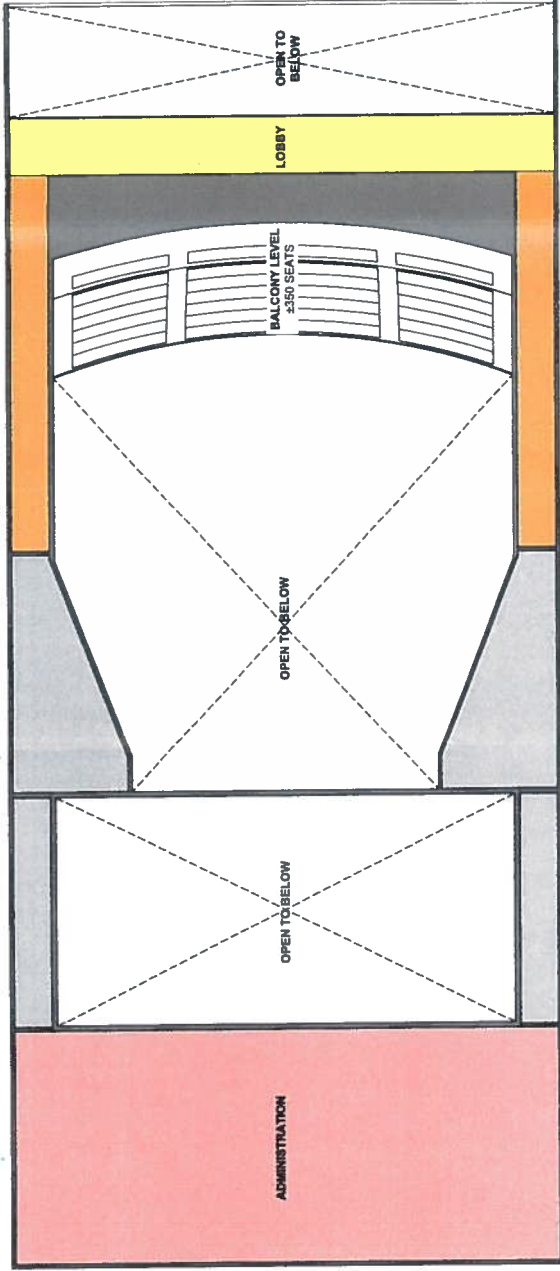
2,850-SEAT BROADWAY THEATRE TEST FIT SKETCH (SITE 10) - ORCHESTRA LEVEL (L01)



27-JUNE-2016

City of Rochester, NY
Performing Arts Center Parking Analysis Worksheet
5/16/2016

2,850-seat Theatre	
Seat Count	2850
Seats for Parking Basis	2500
Averaging Factor	0.7
Net	1750
Average 2.5 Patrons / Car	700



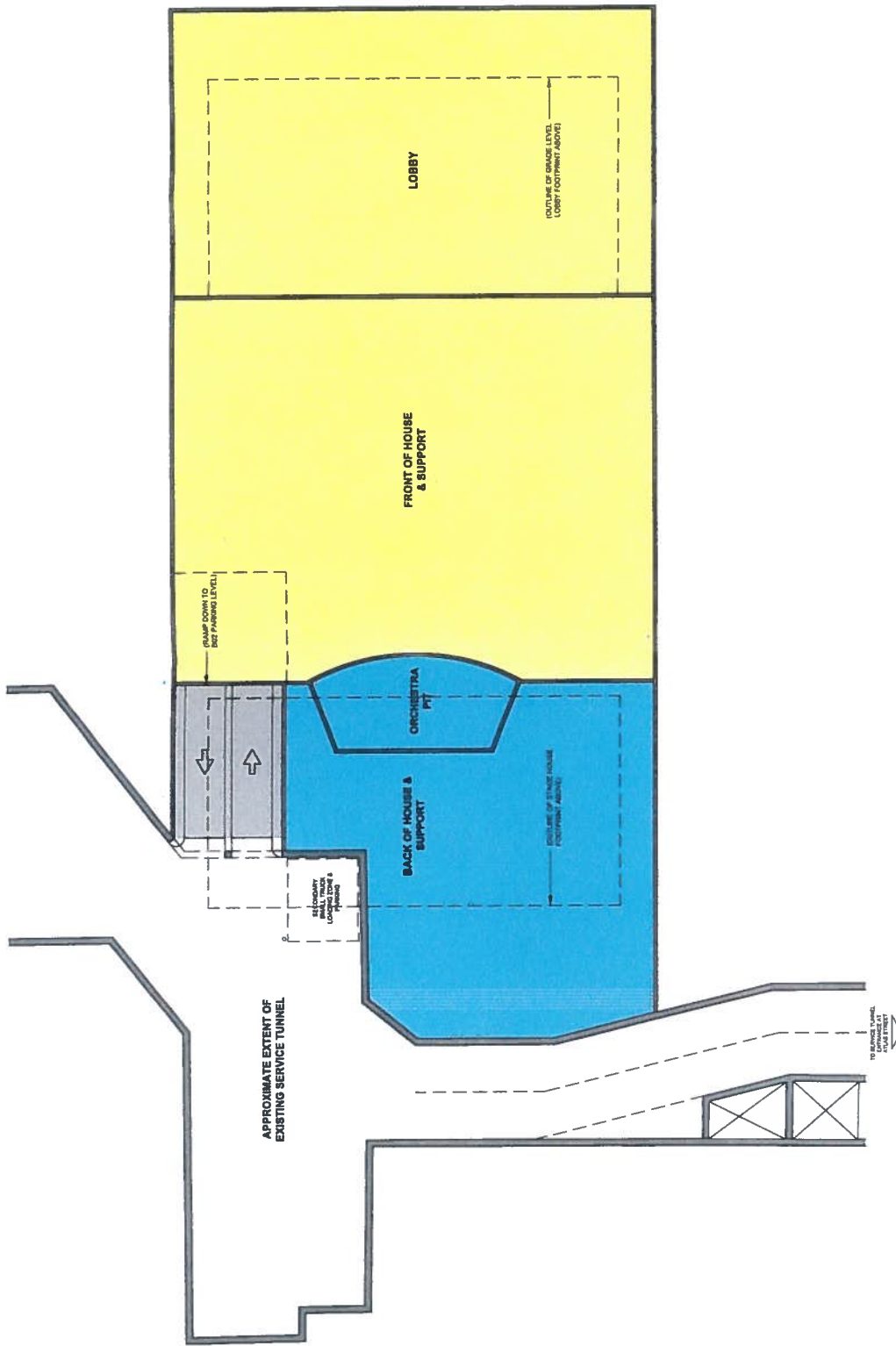
27-JUNE-2016



CITY OF ROCHESTER DOWNTOWN PAC

2,850-SEAT BROADWAY THEATRE TEST FIT SKETCH (SITE 10) - BALCONY LEVEL (L03)

Westlake
Reed
Leskosky

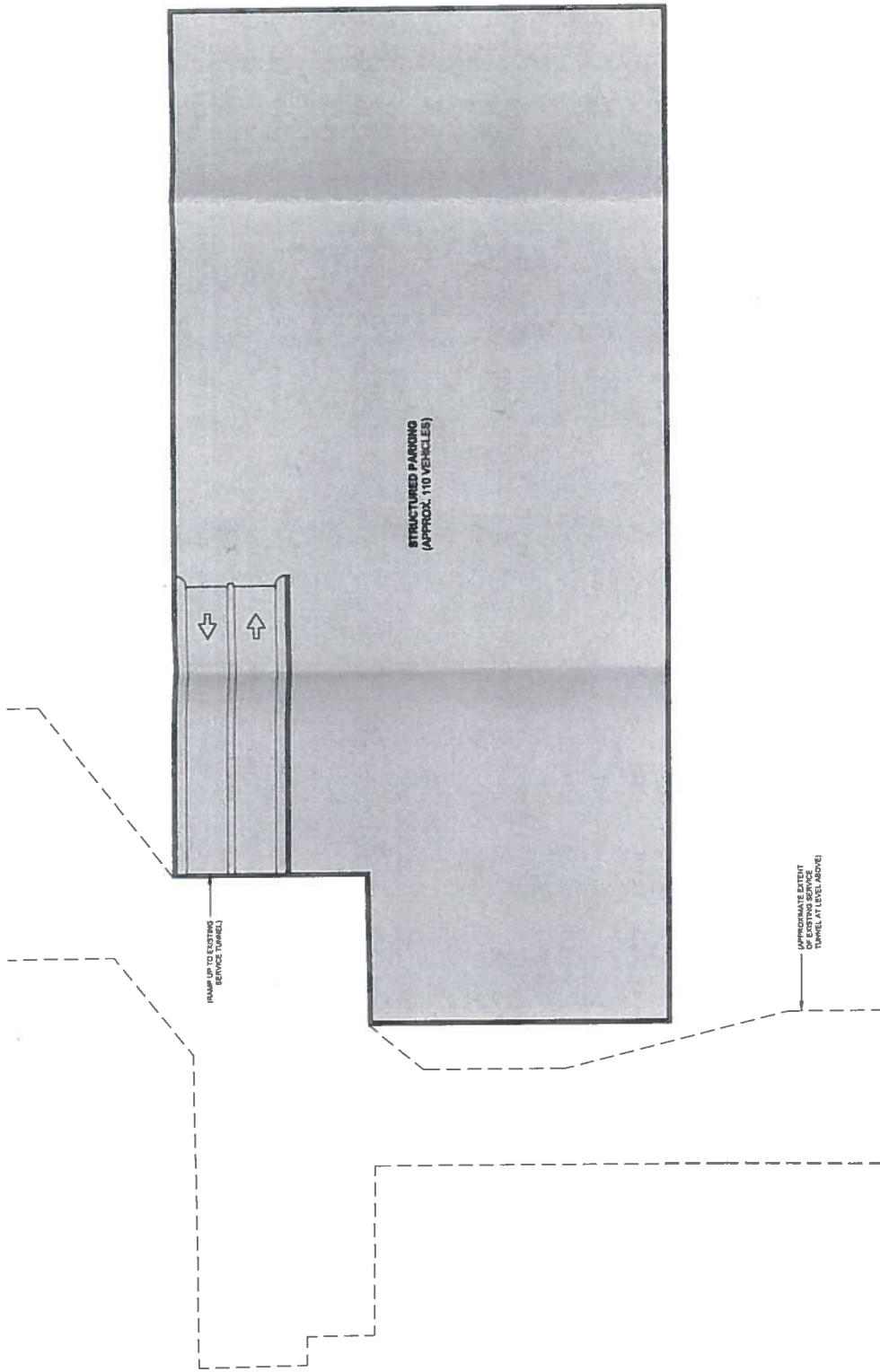


27-JUNE-2016

CITY OF ROCHESTER DOWNTOWN PAC

2,850-SEAT BROADWAY THEATRE TEST FIT SKETCH (SITE 10) - BASEMENT LEVEL (B01)

Westlake
Reed
Leskosky

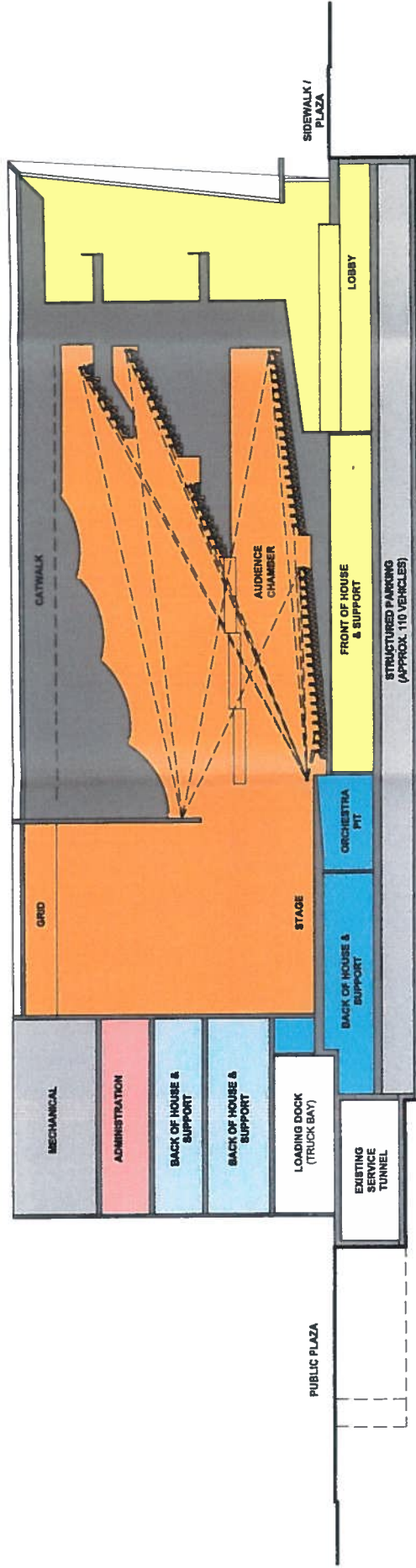


27-JUNE-2016

CITY OF ROCHESTER DOWNTOWN PAC

2,850-SEAT BROADWAY THEATRE TEST FIT SKETCH (SITE 10) - GARAGE LEVEL (B02)

Westlake
Reed
Leskosky



0 16' 32' 64'

Westlake
Reed
Leskosky

CITY OF ROCHESTER DOWNTOWN PAC

2,850-SEAT BROADWAY THEATRE TEST FIT SKETCH (SITE 10) - CENTERLINE SECTION

27-JUNE-2016

Narrative of Site Acoustic Analysis – Option 01 (Site 10)

Measurements

An acoustic survey of site 10 was performed on 4/13/16 - 4/14/16. The goal was to generally quantify ambient sound levels due to traffic, train, and other environmental noise sources as well as observe existing conditions to subjectively evaluate the sites for impact of these ambient sounds on the potential siting of a performing arts center. Multiple measurements were taken on site, each lasting approximately 10 minutes.

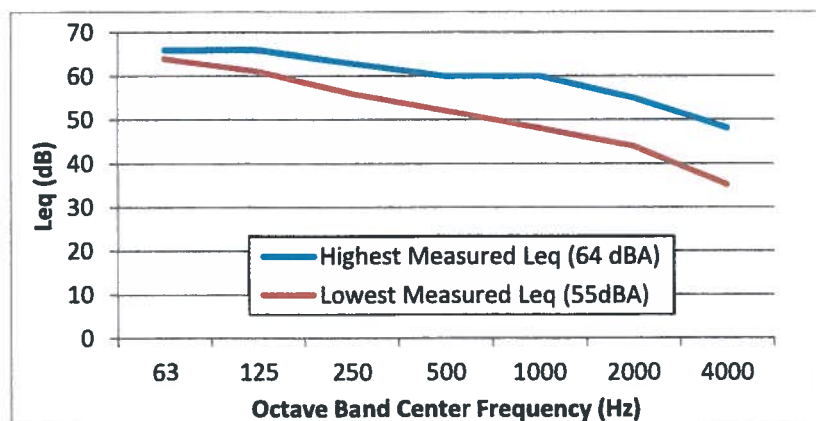
Information included Site Analysis

- A satellite map of the site - This image shows the loudest contributing steady state noise sources measured on site. Roads are marked in **RED** and train lines marked in **BLUE**. The areas notated have "line of sight" to the potential building site and are controlling the sound levels at the site. The parts of these sites closest to these noise generating elements are the loudest. In potentially designing an acoustically sensitive building on each of these sites, it would be ideal to locate acoustically sensitive spaces away from these noise producing areas.
- Leq – Average sound level measured over the measurement period, in this case approximately 10 minutes at each measurement location. A range is shown when there was a difference for measurement locations in different areas of the site(s).
- Lmax – The instantaneous single loudest "event" measured at each site as well as the "event" causing this maximum level. These "events" are typically short term and do not really affect the average (Leq), however sound isolation design must consider steady state noise as well as instantaneous events.

Site 10: Parcel 5 – Midtown Redevelopment Site



Site 10 was found to be in a relatively quiet zone for an urban core compared to some of the other sites evaluated. Measured ambient noise (Leq) levels ranged from 64 dBA along Main St to 55 dBA along the south end of the site. The highest and lowest measured ambient levels are shown below:



The highest instantaneous (Lmax) sound level measured was 82 dBA, due to a construction vehicle passing by the site on Main st at a relatively low level of speed. This maximum level was analogous to most maximums measured from similar vehicle traffic on other sites evaluated.

Both the average and instantaneous maximum sound levels measured drop off rapidly as one moves South away from Main St due to building shielding, and low traffic volume/speed on local surrounding surface streets. Ideal building siting to minimize acoustic isolation construction would entail keeping acoustically sensitive spaces on the south end of the site, which in this case correlates with the natural siting of a lobby on Main St. which would provide an acoustical buffer to more critical acoustically sensitive spaces.

We note that there is an underground tunnel which travels under the site that may have heavy truck traffic at times. While no audible noise from traffic was observed or measured from this tunnel, should this site be selected for construction, it would be advisable to make ground vibration measurements as a part of an Environmental Impact Report. Such measurements were beyond the scope of this study

Overall this site is similar in nature to many urban performing arts facilities, with the loudest frontage naturally using the lobby as an acoustic buffer. There would be potential benefit from having the quieter surrounding surface streets in close proximity to more acoustically sensitive areas of the building. Slower traffic speeds and less heavy vehicle traffic on these side streets could decrease the need for extreme acoustic isolation construction and reduce the risk of intrusion from short term events like large trucks.

Site Civil / Geotechnical Analysis – Option 01 (Site 10)

1. Geotechnical

The bedrock for this site has been determined to be at an elevation of approximately 509'-510', based on previous work done on and around the site. The bedrock is composed of fine grained, gray, Lockport Dolomite, which was previously determined as capable of supporting up to 50 tons per square feet of bearing. Grade elevation of this particular site is at approximately 534'.

There is an underground tunnel system known as the Midtown Truck Service Tunnel, with an entrance on Atlas Street, which encroaches on to the southern portion of the project site. On the Western property line the tunnel encroaches approximately 80 feet northward, into the project site - this is the furthest that the structure encroaches onto Site 10. It then tapers inconsistently southward, while heading toward the Eastern property line. At approximately the middle of the project site the structure encroaches its minimum distance of about 22 feet. The tunnel then begins to taper northward again until the Eastern property line where it encroaches roughly 28 feet onto the project site.

The below grade structure has a street entrance elevation, on Atlas Street, of 535 feet. Then, at its lowest point within the project boundaries, it has a floor elevation of 513 feet and a ceiling elevation of 533 feet. This tunnel has a floor to ceiling height ranging from 20- 20 ½ feet. This places the tunnel 1-1 ½ feet below site grade.

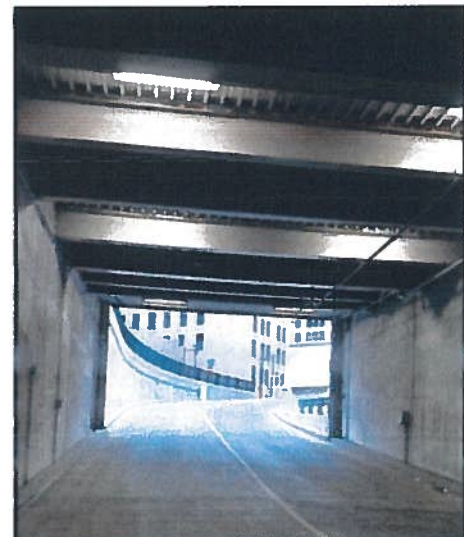
There are two levels below ground in the proposed design. The first below grade level would be a basement for stage support, then below that is one level of parking. The proposed below grade parking would have an approximate floor to ceiling height of 12 feet and possible capacity of 110 parking spaces. The entrance to this parking would be integrated into the already existing tunnel that encroaches onto Site 10. The geotechnical intent is to situate the below grade improvements above bedrock.

2. Site Access

The site fronts Cortland Street to the west, East Main Street to the north, Andrew Langston Way/Euclid Street to the east and a pedestrian park to the south. The reported traffic counts from 2014 for Main Street was 8,495 average daily trips. Traffic counts of other streets are not available.

Courtland Street is a two lane road with on street parking on both sides. Main Street is a four lane road with on street parking adjacent to this site for eastbound traffic. Euclid Street is a southbound one way road with on street parking on both sides. Andrew Langston Way is a two lane road with on street parking on both sides. The intersection of Courtland and Main is signalized. With the site situated along Main Street, the site has good accessibility from City streets.

Access to the proposed below grade parking would be via the entrance of the existing tunnel, that encroaches onto the project site. This entrance is located on the West side of Atlas Street



Tunnel Entrance

approximately 200' east of the site. Once in the tunnel, an entrance ramp is proposed in the northern wall of the below grade structure; located under the southwest portion of the project site. This entrance ramp would then lead down to the one level of below grade parking for approximately 110 vehicles. In order to meet the anticipated parking needs for the proposed Performing Arts Center, additional parking capacity may be supplemented by available parking within close proximity of the site. It should be noted the close proximity and access of the Midtown Garage. The underground tunnel, which acts as the street level entrance to the below grade parking, has a shared wall with the Midtown Garage that features a loading dock and pedestrian walkway that could be modified to integrate or accommodate patrons for the proposed Performing Arts Center. Use of a common pedestrian walkway could ensure covered parking and a sheltered walk all the way to the proposed Performing Arts Center.



Tunnel – Potential Ramp Penetration

3. Site Utilities

There is a 4" forcemain from the tunnel low point. The storm sewer pipe traverses the site from the southeastern corner to the northern portion of the site where it connects into a catch basin and then continues on westward to connect into a Courtland Street pipe, where it discharges. This line may need to be rerouted around or through the proposed Performing Arts Center building's basement. There is a separated 8" storm sewer line that discharges from the site into a street pipe on Courtland Street. East Main Street has no accessible storm sewer connection. Euclid/Andrew Langston Way has no storm stubs, but has a street catchment system that appears to drain into a combined sewer system.

Courtland Street has a watermain on the eastern side of the street beneath the pavement with a hydrant adjacent to the site. East Main Street has a watermain on the opposite side of the street with no hydrants to the site. There is a watermain underneath Euclid/Andrew Langston Way with one hydrant adjacent to Site 10.

There are two sanitary laterals coming to the site from East Main Street and another three that come from Euclid/Andrew Langston Way. Courtland Street does not have any sanitary sewer lines.

Courtland does not appear to have access to electrical utilities, but both East Main Street and Euclid/Andrew Langston Way have electric vaults with good access to the site. The vault on East Main is on the south side of the street and the vault on Euclid/Andrew Langston Way is on the West side of the street.

There are no communication utilities that come to the site from Courtland Street. However East Main Street has a communication vault on the south side of the street, and utility stub to site. Both have good access to the project site. Euclid/Andrew Langston Way has two communications vaults on the street, and the southernmost vault has a stub directly to the site.

Euclid/Andrew Langston Way is the only street with Gas utility connections that come to Site 10. There is only one lateral.

There are no steam utilities immediately adjacent to the site. The

closest steam line is at the intersection Euclid and Euclid/Andrew Langston Way, however this site is with the Rochester District Heating service area for steam.

4. Observed Encroachments

The previously mentioned tunnel drain that traverses the site would need to be rerouted in such a way that it accommodates the new design. This could be done by routing it through the proposed Performing Arts Center building's basement or it could be rerouted around the building completely.

The below grade tunnel structure, mentioned previously, could possibly serve as an access point for below grade parking. Working on, in or around this tunnel poses some unique challenges. There would need to be detailed coordination with those who own and use the tunnel. This tunnel would also likely present construction limitations that depend on the structural integrity of the tunnel, as well as design limitations that would determine how to integrate the new design with the existing tunnel.

5. Floodplain

This site does not fall within an existing flood plain.

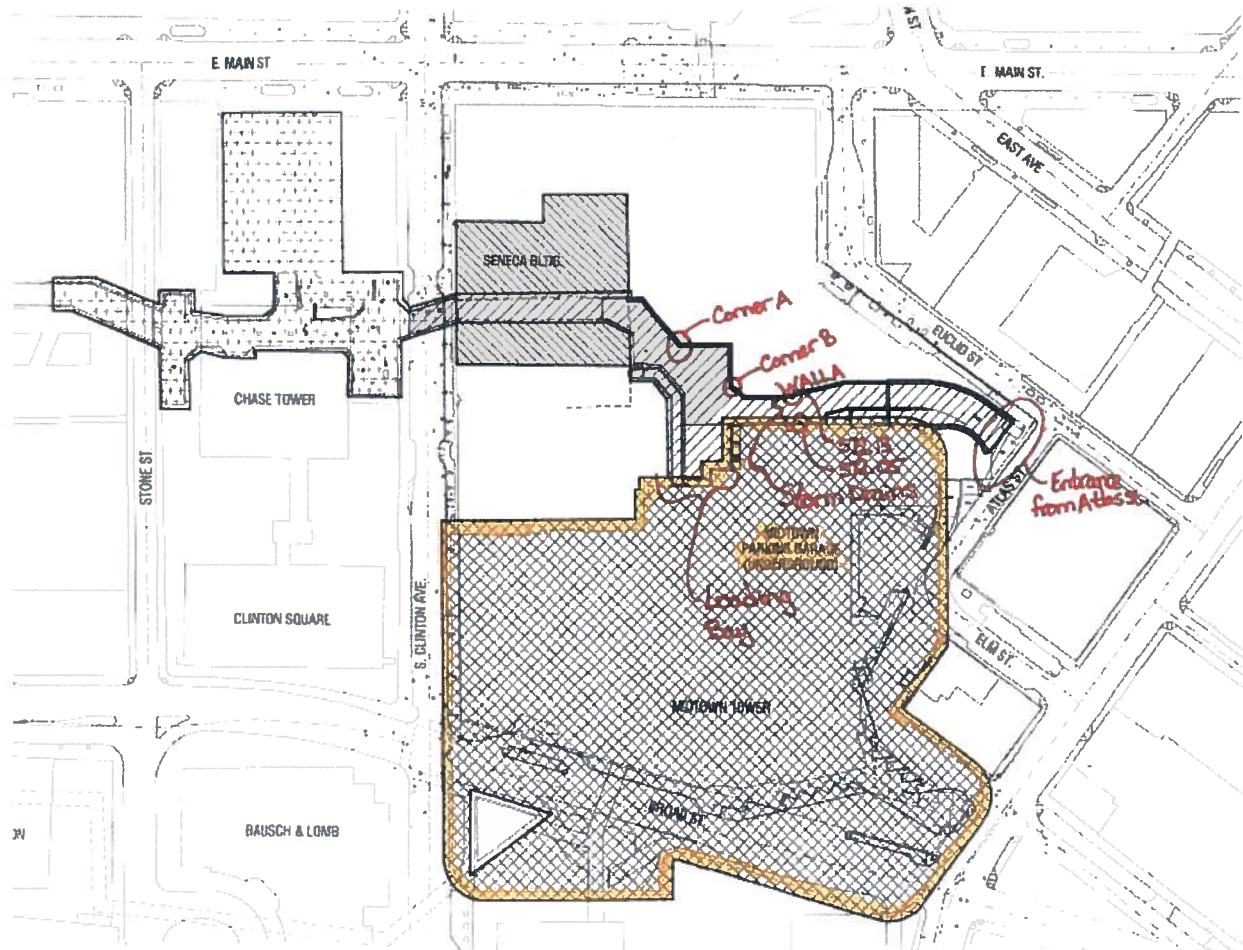


Figure A. PAC Site & Midtown Garage Layout



NASCO		
CONSTRUCTION SERVICES INC.		
SUBJECT:	SITE #10 (PARCEL5)	
PROJECT:	CITY OF ROCHESTER DOWNTOWN PAC COST SKETCH	
LOCATION:	ROCHESTER, NY	
TYPE EST.:	FEASIBILITY	
CLIENT:	WESTLAKE REED LESKOSKY	
ASSUMPTIONS		NASCO OPINION
SITE #10 WILL BE DEVELOPED		OPTION 1, SITE #10
MID-POINT CONSTRUCTION JAN 2019		Large Theatre, Stand Alone
EXCLUSIONS		
HIGH GROUND WATER MANAGEMENT		
ROCK REMOVAL		Broadway Roadhouse/ 2700-3000 seats
HAZARDOUS MATERIAL ABATEMENT		
LAND, ENDOWMENT		Touring Broadway/ Major Productions
		ASSUMES 1 LEVEL BELOW GRADE PARKING
Hard Costs		
	Gross Area of PAC, excluding parking	97,288
	PAC Construction Cost/ GSF, Excluding, performance equipment, FFE,	\$436.84
	Performance Equipment	\$2,000,000
	PAC Construction Cost, excluding FFE, parking	\$44,499,464
	Parking (Below Grade) Construction Cost	\$7,517,810
	Subtotal PAC Bldg + Parking Const Cost, Excl FFE (2016 dollars)	\$52,017,273
	Design /Estimating contingency	\$5,201,727
	PAC Bldg + Parking Const Cost (2016 dollars)	\$57,219,000
	Escalation Allowance @ 4.0% / year (2 1/2 YRS TO JAN 2019)	\$5,906,832
	PAC Bldg + Parking Const Cost, escalated to mid-point of construction, 1.1.20	\$63,125,832
	Sales Tax Basis	\$30,348,958
	Sales Tax	\$1,213,958
	SUBTOTAL CONSTRUCTION COST INCLDG SALES TAX	\$64,339,791
Soft Costs		
	FF+E	\$500,000
	Site investigation	\$200,000
	Design Fees + Related	\$6,312,583
	Permitting & Construction	\$1,262,517
	Project Management	\$700,000
	Subtotal	\$8,975,100
Owner's Costs		
	Contingencies - 5% -	\$3,605,047
	Fundraising & Operating	TBD
	Subtotal	TBD
Grand Total	Excludes Fundraising & Operating (to be filled in by AMS)	\$75,705,979
ADD ALTERNATE	ADDITIONAL LEVEL OF PARKING BELOW GRADE IN ROCK	\$9,068,276

PRO FORMA INCOME STATEMENT

	RUN UP		YEAR 1		YEAR 2		YEAR 3
EARNED REVENUES	Assumes 6 months and 10% haircut						
BOX OFFICE-RPAC TICKET SALES	113,009		251,130		382,217		536,349
BOX OFFICE- SHARED CO-PRODUCTION	43,073		95,717	3%	71,788		73,223
HOUSE RENTAL INCOME NON RBTL	172,170		382,600		410,391		426,500
HOUSE RENTAL INCOME RBTL	300,347		667,437		667,437		680,786
GALA NET	0		132,490	3%	136,465	0%	136,533
USER FEES (RENTALS)	43,043		95,650	3%	98,520	0%	98,569
SCREEN ADVERTISING	1,105		2,455	3%	2,529	0%	2,530
CONCESSION - ALCOHOL NET	47,895		106,433		114,787		133,516
CONCESSION - FOOD NET	60,917		135,370		149,769		160,876
CONCESSION - MERCHANDISE	18,961		42,136		0		0
INTEREST INCOME	0		0		0		0
TICKET ADVERTISING	0		0		0		0
BOX OFFICE TICKETING FEES	45,765		101,700		0		0
TOTAL EARNED REVENUES	846,283		2,013,118		2,033,901		2,248,882
COST OF SALES	No Haircut						
FILM DIRECT COSTS AS % REVENUE	26,598		53,196		67,097		78,613
RPAC SPECIAL AND SIMULCAST	42,323		84,645		139,495		199,555
HOUSE RENTAL EXPENSE	38,260		76,520		82,078		85,300
B.O. FEES PAID TO SOFTWARE VENDOR	6,278		12,557		19,111		26,817
CREDIT CARD FEES	3,767		7,534		11,466		16,090
TOTAL COST OF SALES	117,226		234,451		319,248		406,376
NET EARNED REVENUE	729,057		1,778,667		1,714,654		1,842,506
OPERATING EXPENSES							
MARKETING / ADVERTISING	42,777		95,060		118,891		144,427
EDUCATION PROGRAMS	6,750		15,000		20,000		25,000
HOSPITALITY	1,575		3,500	5%	3,675	5%	3,859
OPERATING SUPPLIES	9,059		20,131		20,339		22,489
OFFICE SUPPLIES & EXPENSE	27,177		60,394		61,017		67,466
ANNUAL REPORT EXPENSE	3,375		7,500	5%	7,875	5%	8,269
PENALTIES	0		0		0		0
PROF/BOARD DEVELOPMENT	3,375		7,500	5%	7,875	5%	8,269
PROFESSIONAL FEES	13,500		30,000	5%	31,500	5%	33,075
BANK CHARGES	900		2,000	5%	2,100	5%	2,205
MEMBERSHIP DUES	2,250		5,000	5%	5,250	5%	1,750
REPAIRS & MAINTENANCE	49,713		110,472	5%	115,996	5%	121,796
CLEANING	44,593		99,095	5%	104,050	5%	109,252
SECURITY SYSTEM	99,095		99,095	5%	104,050	5%	109,252
IT SERVICES AND SUPPORT			30,000	5%	31,500	5%	33,075
INSURANCE - DIRECTOR & OFFICER	2,500		2,500	5%	2,625	5%	2,756
VOLUNTEER ACCIDENT INSURANCE	2,500		2,500	5%	2,625	5%	2,756
INSURANCE/GENERAL LIABILITY	160,000		160,000	5%	168,000	5%	176,400
WORKMEN'S COMPENSATION			17,317		17,836		18,728
FEES	0		0		0		0
OPERATING INTEREST EXPENSE	0		0		0		0
TELEPHONE	6,750		15,000	5%	15,750	5%	16,538
POSTAGE	2,250		5,000	5%	5,250	5%	5,513
PAYROLL EXPENSES	6,254		13,897		14,314	5%	15,030
HEALTH INSURANCE	34,425		76,500	5%	80,325	5%	84,341
HEALTH DEPT. LICENSE FEE	500		500		505		525
SALARIES & WAGES	432,917		865,835	3%	891,810	5%	936,400
PAYROLL TAXES	47,621		95,242	3%	98,099	5%	103,004
UTILITIES	133,778		297,285	5%	312,149	5%	327,757
INTEREST EXPENSE L.O.C.	0		0		0		0
TOTAL EXPENSES	664,495		2,136,322		2,243,406		2,379,932
NET FROM OPERATIONS	64,562		-357,655		-528,752		-131,050
CONTRIBUTED REVENUES							
MEMBERSHIP	10,000		125,000	5%	131,250	5%	137,813

ANNUAL APPEAL	29,894		66,432	3%	68,425	3%	70,478
FOUNDATION GRANTS			250,000	3%	257,500	0%	257,500
CORPORATE SPONSORSHIP	22,500		50,000	3%	51,500	0%	51,500
CONTRIBUTION/OTHER GIFTS	45,000		100,000	3%	103,000	0%	103,000
TOTAL CONTRIBUTED REVENUES	107,394		591,432		611,675		620,290
FUNDRAISING EXPENSE (NON-PERSONNEL)							
FUNDRAISING COSTS	0			5%	0	5%	0
MEMBERSHIP DRIVE				5%		5%	
CAMPAIGN EXPENSES	0		0	5%	0	5%	0
TOTAL FUNDRAISING EXPENSE	62,500		125,000	5%	131,250	5%	137,813
NET FROM FUNDRAISING	44,894		466,432		480,425		482,478
NET FROM OPERATIONS AFTER FUNDRAISING	109,456		108,777		-48,327		351,428
DEPRECIATION on \$60,000,000	-1,437,500		-1,437,500		-1,500,000		-1,500,000
FINAL RESULTS FOR FISCAL YEAR	-1,328,044		-1,328,723		-1,548,327		-1,148,572
CARRY OVER FROM PREVIOUS YEAR	0		109,456		108,777		60,449
ACTUAL POSITION AFTER DEPECIATION	-1,328,044		-1,219,267		-1,439,551		-1,088,123
CASH POSITION FROM CARRYOVER + OPERATIONS	109,456		108,777		60,449		411,877

Executive Summary – Option 2

During our interviews with City leaders and key stakeholders within the Rochester arts and cultural community, it became apparent that there is both a need and desire for additional theater spaces to supplement existing performance spaces within the community. Working closely with these leaders WRL developed a program for the most high value additional program which includes a 300 seat proscenium theater, a 125 seat black box theater and education spaces. To this program we added the new 2,850 seat Broadway Theater similar to that developed in Option 1, and the structured parking needs for the cumulative set of facilities.

The consulting team then developed test fits of this expanded Option 2 program on the various sites and reviewed our findings with City leadership. Ultimately Site #8 was identified as the most ideal location for the new RPAC with the expanded and more comprehensive Option 2 program. This site is highly visible along the river's edge from downtown Rochester as well as the inner loop, and is easily accessed. This site includes easement restrictions and will likely require the re-location of storm water lines from the I-490 overpass, but these are understood to be relatively affordable to work around.

Similar to Option 1, the preliminary planning layout for this revised Option 2 as conceived by the WRL team utilizes tall glass lobby walls so as to be inviting to the public and allow views of the performance "vessels" within. The 2 proscenium theaters in this scheme sit side by side so as to share more directly support spaces both at the front and back of house. The schemes employ a raised "Festival Plaza" to the north which allows performance activities in the warmer months and more flexibility in programming between spaces. This raised plaza increases visibility of the RPAC but also enhances views back to the city. Structured at multiple grades is provided from multiple access points.

This Option 2 program and scheme Using the WRL preliminary design, an opinion of probable project cost of approximately \$163 million has been estimated for the construction of the Option 2 program as developed on Site #8. The preliminary findings of the Economic Impact Analysis indicate that for the construction of a new Performing Arts Center based on Option 2, the construction project alone would generate an estimated \$132.9 million in direct local expenditures and create 2,140 full-time equivalent (FTE jobs) over the life of the project. Total economic impact, including both direct and indirect expenditures, is estimated at \$255.7 million.

Date	2/23/2016						REVISED 04/11/16 RAK
Program Study	City of Rochester						REVISED 04/27/16 RAK
Theatre Name	Rochester Performing Arts Center						
Theatre Location	Rochester, NY						
Prepared By:	Westlake Reed Leskosky						
2016-FEB PRELIMINARY Program							
ITEM NAME	# OF UNITS	UNIT TYPE	SQ FT / UNIT	NET AREA (SF)	Notes		
Public Spaces							
Public lobby	2850	Each	7	19,950	Circulation portion in grossing		
Audience chamber sound + light locks	6	Each	150	900			
Concessions with storage - orch level	1	Each	250	250			
Concessions with storage - balc level	2	Each	150	300			
House Manager	1	Each	80	80			
Box office - sales	4	Each	35	140			
Box office - manager's office	1	Each	120	120			
Public restrooms - male	60	Toilets	36	2,160			
Public restrooms - female	80	Toilets	58	4,640			
Public unisex / family restroom	8	Each	80	640			
Ushers' room / storage	1	Each	150	150			
Private Audience Room	1	Each	100	100			
Cry Room	1	Each	120	120			
Front of house storage	1	Each	120	120			
Visit company merchandise storage	1	Each	80	80			
Visiting Company Merchandising Sales	1	Each	200	200			
Audience elevator	1	Each	0	-			
Coat check	250	Each	1	250	part of grossing		
Subtotal				30,260			
Perf. / FOH Spaces							
Audience chamber	2850	Each	11.5	32,775			
Stage	1	Each	3600	3,600	60'w x 60'd		
Stage wings	2	Each	1800	3,600	30'w x 60'd		
Stage apron	1	Each	400	400	80'w x 5'd		
Orchestra pit	20	Musicians	17	340			
ADA Lift to Orchestra Pit	0	Each	0	-			
Amplifier rack room incl transformer	1	Each	120	120	part of grossing		
Lighting / sound control booth	1	Each	320	320			
Followspot booth (4 followspots)	1	Each	300	300			
ADA Lift to Control Booth	1	Each	250	250	part of grossing		
House tech mix - sound/lights/video	1	Each	250	250			
Subtotal				41,705			
Stage Support							
Orchestra shell storage (15 towers)	1	Each	120	120	Not In Scope		
Piano storage	1	Each	1200	1,200	Adjacent to Dock		
Musicians / dead case storage	1	Each	150	150			
Pit storage (music stands, chairs)	50	Musicians	7	350	Larger groups share choir dressing		
Musicians / Choir Holding	1	Each	120	120			
Visiting stage manager's office	1	Each	100	100			
Visiting company manager's office	4	Toilets	60	240			
Backstage ADA restroom (single user - men)	1	Toilets	60	240			
Backstage ADA restroom (female)	1	Toilets	60	240			
Dressing room	1	Each	120	120			
Lighting storage	1	Each	240	240			
Sound storage	1	Each	150	150			
Misc. backstage storage	1	Each	300	300			
Catwalk Level	1	Each	400	400			
Crew room	1	Each	400	400			
Repair shop including office, tool storage, material storage	1	each	1000	1,000			
Subtotal				4,890			
Performer Support							
Chorus (10 person) dressing rooms w/ toilet + shower	2	Each	500	1,000			
Chorus (12 person) dressing rooms w/ 2 toilets + 2 showers	2	Each	750	1,500			
Chorus 15 person) dressing rooms w/ 3 toilets + 3 shower	4	Each	250	1,000			
Principal (1-4 person) dressing rooms w/ toilet + shower	4	Each	200	800			
Star dressing rooms w/ toilet + shower	1	Each	200	200			
Make-up Room	1	Each	200	200			
Wig / Hair Room	1	Each	200	200			
Quick change and toilet	2	Each	80	160			
Wardrobe including laundry	1	Each	500	500			
Green room / performers' lounge with canteen/vending	1	Each	400	400			
Catering/warming kitchen	1	Each	160	160			
Elevator, back stage	1	Each	2,000	2,000	part of grossing		
Dance rehearsal room	1	Each	1,500	1,500			
Multi-purpose room (size of stage)	1	Each	3600	3,600			
Rehearsal Room	1	Each	1,500	1,500			
Subtotal				13,020			
Services							
Housekeeping closet	5	Each	30	150			
Mechanical room	1	Each	1200	1,200	part of grossing		
Electrical rooms	1	Each	1,200	1,200			

City of Rochester, NY
Performing Arts Space Program (community use)
Assumes Community Theatres are combined with large theatre

4/21/2016

		New Building		
		Unit Qty	Unit Area, NSF	Area, NSF
Public Spaces				
	Lobby & Reception	200	7	1400
	Box Office (add theater director and assistant)	1	200	200
	Public Toilets	6	50	300
	Concessions	2	40	80
	Concessions storage	1	40	40
	Front of House storage	1	100	100
	Janitor's Closet	1	25	25
	Catering Support Space	1	120	120
	Passenger Elevator for Theatre 2	0	50	0
	Loading Dock/Receiving	0	300	0
	Subtotal			2265
Performance Spaces				
	Black Box - 125 seats (performance + audience seating areas)	1	2800	2800
	Black Box Control Booth	1	150	150
	Theatre 2 - 300 seats (audience seating area)	300	10	3000
	Theatre 2 - 300 seats (performance area)	1	2400	2400
	Theatre 2 - Control Booth(s)	2	150	300
	Theatre 2 - Trap/ Orchestra Pit area	1	250	250
	Dimmer Room (s)	1	300	300
	Subtotal			9200
Backstage Support Spaces				
	Black Box Dressing Room #1 (10 stations)	1	350	350
	Black Box Dressing Room #2 (10 stations)	1	350	350
	Black Box Principal's Dressing Room	1	150	150
	Black Box Dressing Room Toilets/ Showers	1	200	200
	Theatre 2 Dressing Room Toilets/ Showers	2	200	400
	Theatre 2 Dressing Room #1 (10 stations)	1	350	350
	Theatre 2 Dressing Room #2 (10 stations)	1	350	350
	Theatre 2: Dressing Room #/ Multi Purpose Room (16 stations)	0	550	0
	Theatre 2 Principal's Dressing Room	1	150	150
	Toilet @ Stage	2	50	100
	Quick Change Booth @ Stage	2	25	50
	Green Room	1	350	350
	Rehearsal Studio	0	2400	0
	Janitor's Closet @ Stage	1	25	25
	Piano Storage	1	60	60
	Backstage Storage for Facility (Equipment, Seating Wagons, Tools, etc)	1	750	750
	On-Site Storage for Arts Users	1	250	250
	Production Crew room/Canteen	1	250	250
	Service Elevator	1	80	80
	Subtotal			4215
Administrative and Staff spaces				
	House Manager/ Front of House Office	0	100	0
	Facility Administrative Staff	0	120	0
	Facility Director	0	180	0
	Education Director	1	150	150
	Visiting Company Staff	2	120	240
	House Technical and Production Staff	2	100	200
	Conference Room	0	200	0
	Storage	1	100	100
	Workspace/Copier	0	150	0
	Coffee/Kitchen/break room	0	100	0
	Subtotal			690
Educational Spaces				
	Small Classroom	2	500	1000
	Large Classroom	1	1000	1000
	Sound Stage and Control Booth	1	325	325
	Classroom Storage	1	100	100
	Subtotal			2425
Fabrication and Craft Space (shared among community at large and arts organizations)				
	Workshop/ Fabrication Studio	1	2800	2800
	Costume and Craft Studio	1	1000	1000
	Laundry/Dye Room	1	250	250
	Subtotal			4050
Infrastructure				
	Electrical Room	1	200	200
	Data/IT Room	1	50	50
	Mechanical/ Plumbing Room	1	300	300
	Subtotal			550
	Total Net Area			23395
	Grossing Factor			
	Subtotal Gross Area			1.45
	Total Gross Area			33,923

City of Rochester, NY
 Performing Arts Center Parking Analysis Worksheet
 5/16/2016

	2,850-seat Theatre	Black Box	300-seat Theatre	TOTAL
Seat Count	2850	125	300	3275
Seats for Parking Basis	2500	113	270	
Averaging Factor	0.7	0.7	0.7	
Net	1750	79	189	2018
Average 2.5 Patrons / Car	700	32	76	807

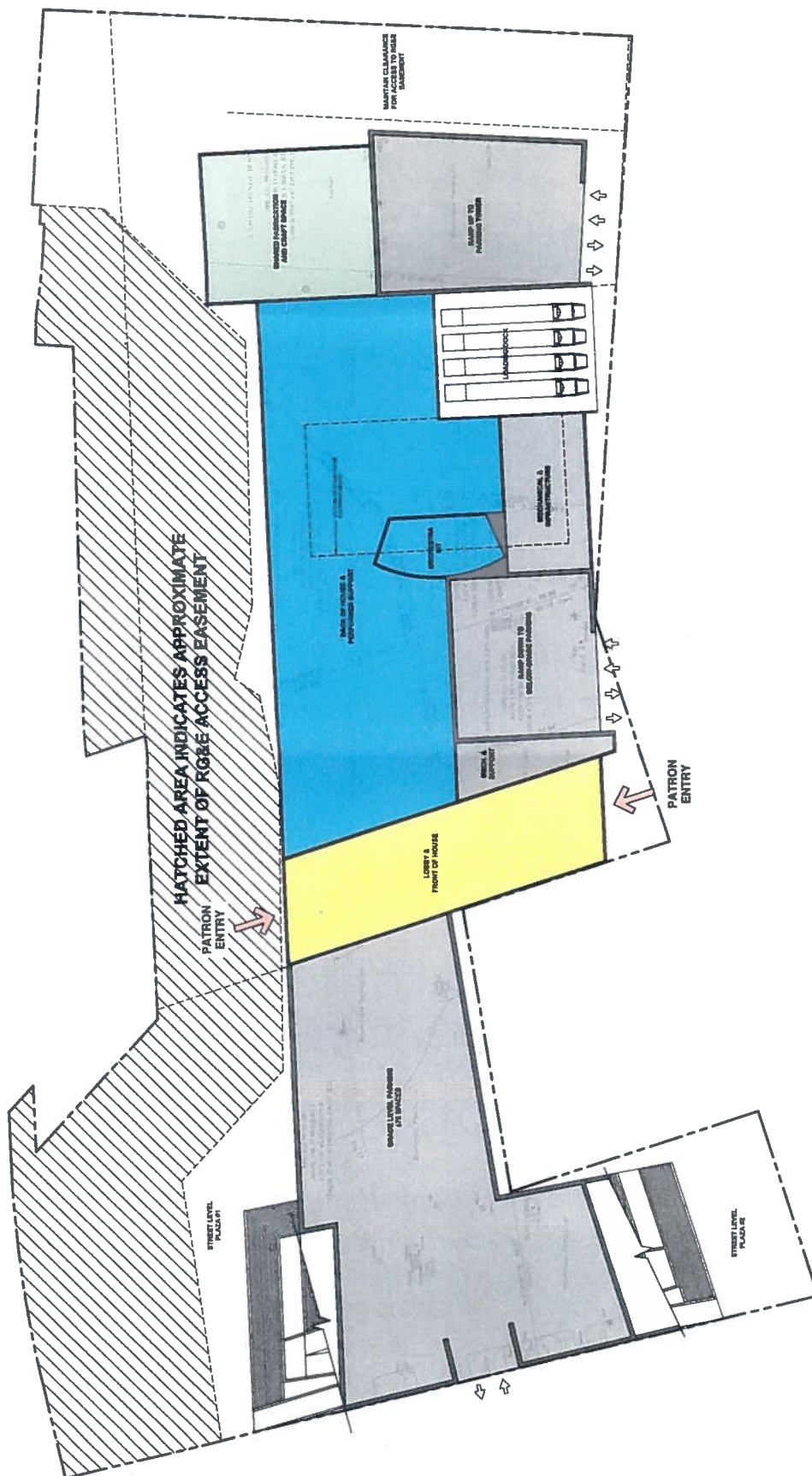


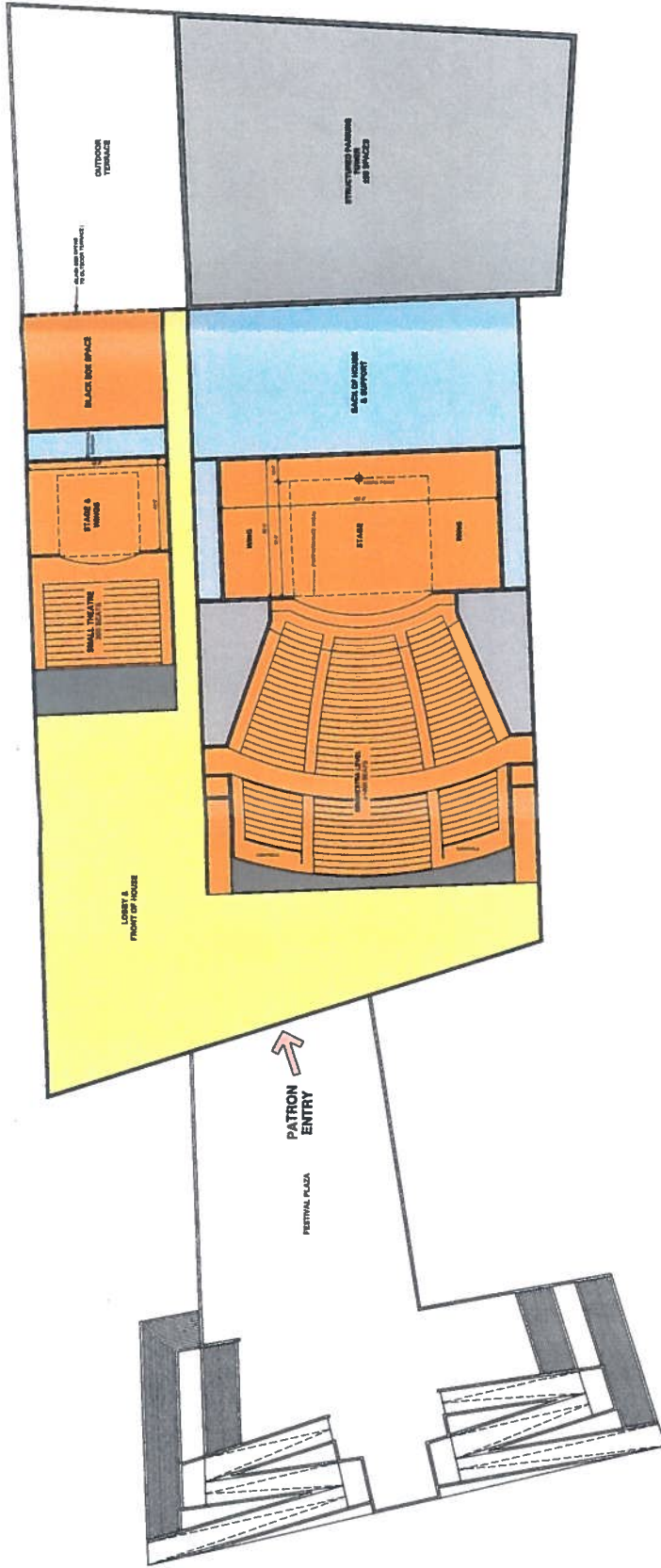
27-JUNE-2016

CITY OF ROCHESTER PERFORMING ARTS CENTER SITE AND FACILITY STUDY

CULTURAL ARTS CENTER TEST FIT SKETCH (SITE 08) - GRADE LEVEL (B01)

Westlake
Reed
Leskosky

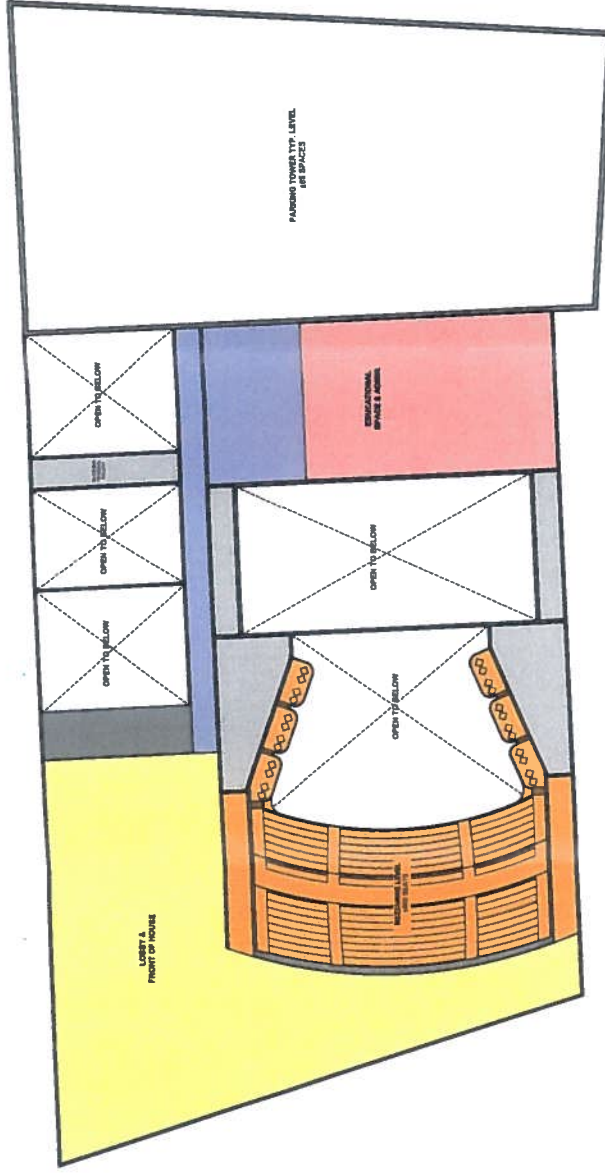




CITY OF ROCHESTER PERFORMING ARTS CENTER SITE AND FACILITY STUDY

CULTURAL ARTS CENTER TEST FIT SKETCH (SITE 08) - PLAZA LEVEL (L01)

27-JUNE-2016

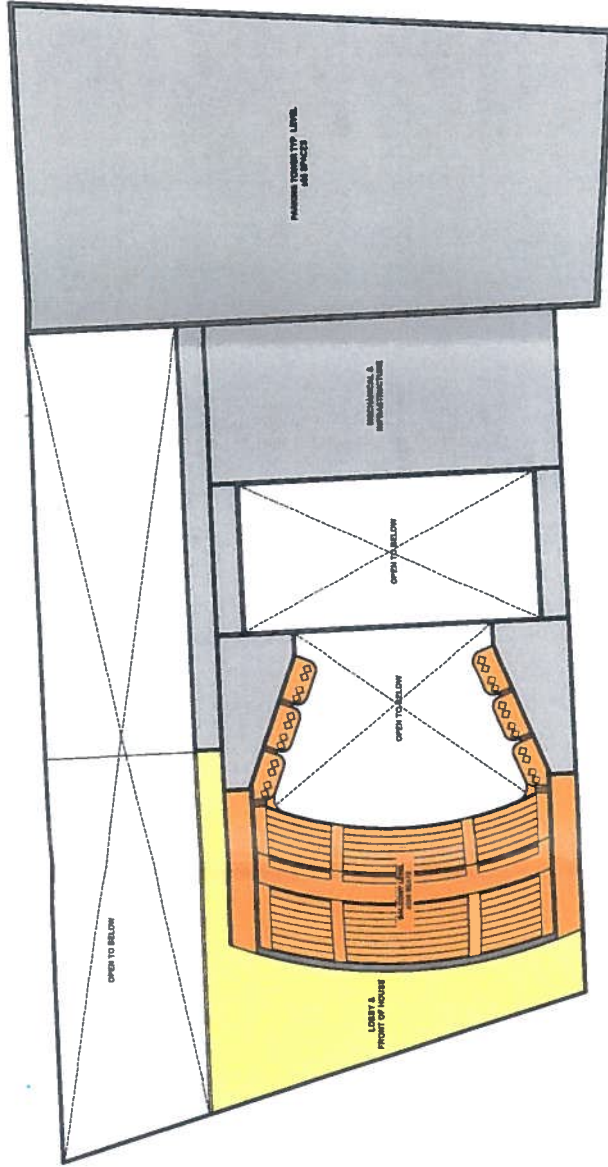


Westlake
Reed
Leskosky

CITY OF ROCHESTER PERFORMING ARTS CENTER SITE AND FACILITY STUDY

CULTURAL ARTS CENTER TEST FIT SKETCH (SITE 08) - MEZZANINE LEVEL (L02)

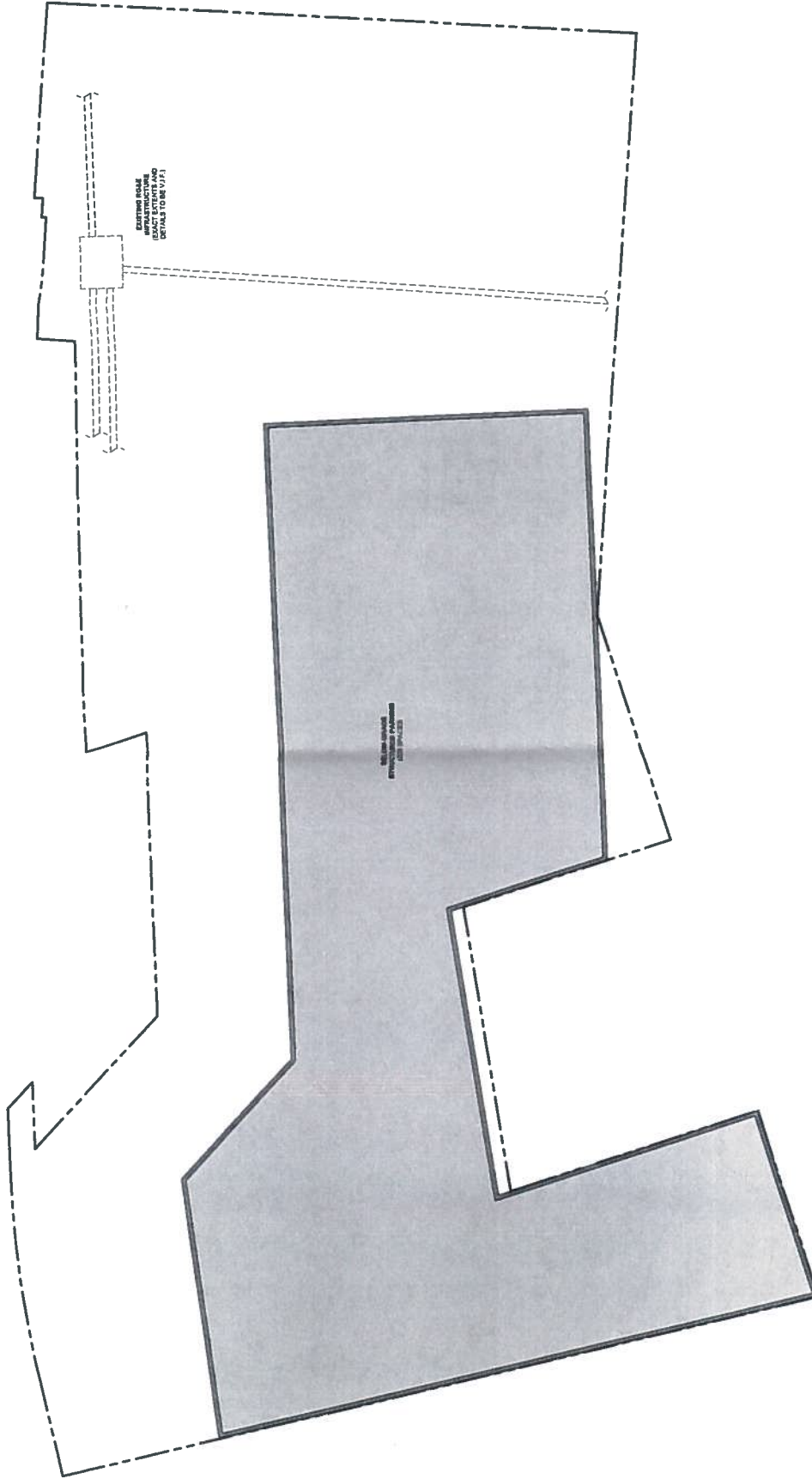
27-JUNE-2016



CITY OF ROCHESTER PERFORMING ARTS CENTER SITE AND FACILITY STUDY

CULTURAL ARTS CENTER TEST FIT SKETCH (SITE 08) - BALCONY LEVEL (L03)

27-JUNE-2016



Westlake
Reed
Leskosky

CITY OF ROCHESTER PERFORMING ARTS CENTER SITE AND FACILITY STUDY

CULTURAL ARTS CENTER TEST FIT SKETCH (SITE 08) - BELOW GRADE LEVEL (B02)

27-JUNE-2016



Narrative of Site Acoustic Analysis – Option 02 (Site 8)

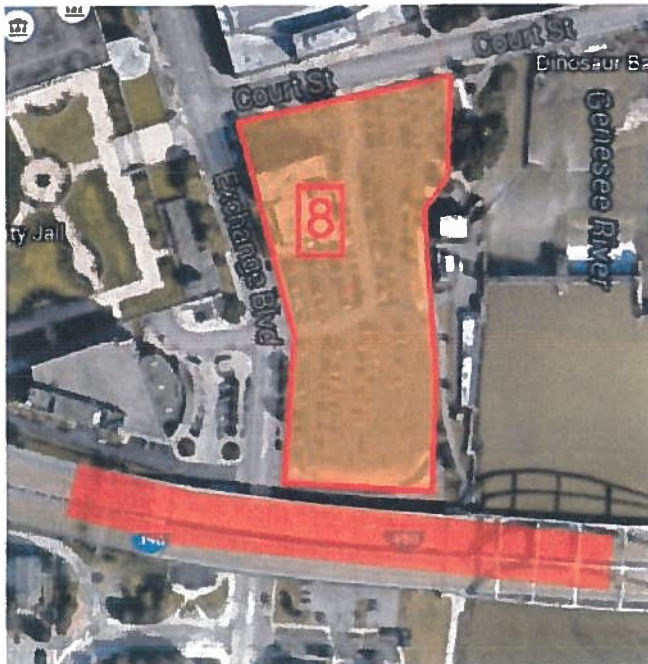
Measurements

An acoustic survey of site 8 was performed on 4/13/16 - 4/14/16. The goal was to generally quantify ambient sound levels due to traffic, train, and other environmental noise sources as well as observe existing conditions to subjectively evaluate the sites for impact of these ambient sounds on the potential siting of a performing arts center. Multiple measurements were taken on site, each lasting approximately 10 minutes.

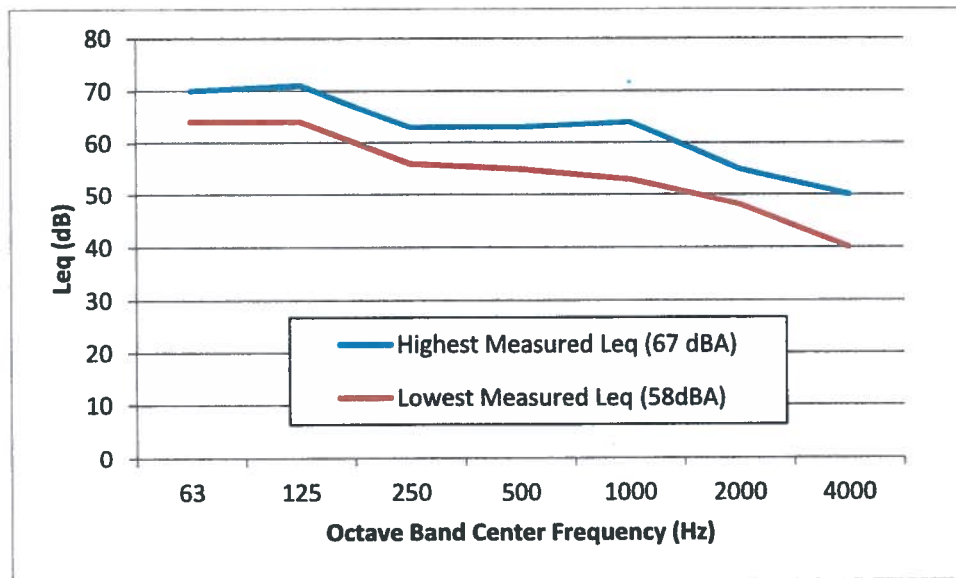
Information included Site Analysis

- A satellite map of the site - This image shows the loudest contributing steady state noise sources measured on site. Roads are marked in RED and train lines marked in BLUE. The areas notated have "line of sight" to the potential building site and are controlling the sound levels at the site. The parts of these sites closest to these noise generating elements are the loudest. In potentially designing an acoustically sensitive building on each of these sites, it would be ideal to locate acoustically sensitive spaces away from these noise producing areas.
- Leq – Average sound level measured over the measurement period, in this case approximately 10 minutes at each measurement location. A range is shown when there was a difference for measurement locations in different areas of the site(s).
- Lmax – The instantaneous single loudest "event" measured at each site as well as the "event" causing this maximum level. These "events" are typically short term and do not really affect the average (Leq), however sound isolation design must consider steady state noise as well as instantaneous events.

Site 8: Court / Exchange Riverside Site



Site 8 was found to be in a zone typical for an urban core compared to some of the other sites evaluated. Measured ambient noise (Leq) levels ranged from 58 dBA along the North end of the site to 67 dBA along the south end of the site near the I-490 bridge. The highest and lowest measured ambient levels are shown below:



The highest instantaneous (Lmax) sound level measured was 89 dBA, due to large vehicles passing over bridge expansion joints on the I-490 bridge at a high level of speed. This maximum level was analogous to most maximums measured from similar vehicle traffic, but the regularity of measured high noise level maximums was much more frequent as compared to other sites evaluated.

Both the average and instantaneous maximum sound levels did not drop off much as one moves north away from the I-490 bridge. In fact, the loudest area seemed to be some distance away from the bridge near the center of the site, as one begins to have a better line of sight to the noise producing elements on the bridge (largely vehicle tires and tractor trailer exhaust openings).

Ideal building siting to minimize acoustic isolation construction would entail keeping acoustically sensitive spaces on the north end of the site, using other structures to shield acoustically sensitive spaces from direct façade frontage with the I-490 bridge. While measuring sound levels at higher elevations where a stage house might end up was beyond the scope of this study, we would estimate that sound levels would likely be *higher* as elevation above the ground increases, due to increased line of sight to bridge traffic noise. Care in particular would be needed to shield and/or provide adequate sound isolation measures to a stage house that may be 50' or more above grade.

Overall this site is somewhat more exposed to high sound levels compared to many urban performing arts facilities, partially due to the sites open nature (no surrounding buildings to shield) and the proximity to high speed traffic at an elevated level on the I-490 bridge.

Site Civil / Geotechnical Analysis – Option 02 (Site 8)

1. Geotechnical

Geotechnical information was provided by the City regarding 180/182 Exchange Boulevard historical investigations. For the purposes of the Performing Arts Center study efforts, additional geotechnical investigations were not completed. From the previous geotechnical investigations, soil borings indicate bedrock to be approximately 14' below grade (approximately 497 feet elevation) and evidence of fill material above bedrock to the surface. Due to the site's close proximity to the Court Street Dam and the Genesee River Flood Walls, there may be complexities in the implementation of a foundation design and bedrock excavations. Therefore excavations may be limited due to bedrock, and foundations will likely need to bear on bedrock.

Further challenges related to excavation and subgrade improvements include the former Rochester Fitzhugh Carroll Millrace. The millrace ran from the existing water intake facility at the Genesee River, across the central portion of the site towards Court Street. See *Figure A* for the approximate location of the former millrace. There may be remnant walls or foundations that could lead to challenges in properly excavating and grading the project site.

2. Site Access

The site fronts both Exchange Boulevard to the west and Court Street to the north. The respective traffic counts from 2010 for these streets were 12,100 and 5,900 average daily trips. Exchange Blvd is comprised of 2 southbound lanes, 1 northbound lane, and a variable center turn lane and on street parking along the northbound lane. Court Street is primarily a two lane road (one each direction) with on street parking on each side. The intersection of Court and Exchange is signalized. With the site situated in the southern area of the City's inner loop, the site has good accessibility from both City streets and nearby highways.

There are three proposed parking areas with this concept:

- A grade level parking lot, with approximately 75 spaces and access from Court Street. The parking entrance off of Court will need to favor the east side of the building to avoid conflicts with the traffic signal at Court and Exchange.
- A below grade parking lot for approximately 220 parking spaces. The primary access point is off of Exchange Boulevard with the potential to interconnect with the at grade parking lot off of Court Street. The alignment of this below grade parking area has been situated to be opposite of the City's Civic Center parking structure entrance off of Exchange Blvd.
- The third parking area is a proposed multi-story parking tower, which would also have access from Exchange Boulevard. It is estimated that there will be approximately 85 cars per level. To minimize the traffic conflicts with the Civic Center parking entrance and its northbound turn lane off of Exchange Blvd, an alternative is to move the tower parking

southerly to align with the service drive on the opposite side of street, and integrate with existing access path between the proposed Performing Arts Center and NYS DOT I-490 highway.

A four bay truck dock just north of the southwest corner of the building with access from Exchange Boulevard is proposed.

3. Site Utilities

There are two storm water pipes that traverse this site. Both storm water pipes come from NYS DOT I-490, enter the site from the southwest, drain to the northeast and outlet through the Genesee River floodwall downstream of the Court Street dam. One of the pipes is 42" diameter and slightly above bedrock while the other is 72" diameter trenched within bedrock. The 72" pipe receives runoff from a portion of the existing parking lot catch basin system. Both pipe runs may need to be rerouted around the proposed building, in order to accommodate the design. This will require coordination with NYS DOT to reroute this utility. In order to preserve storm sewer pipe grade, a 12' vertical depth of bedrock excavation may be required. A potential solution to minimize this effort could be to combine both pipes into one and modify the outlet penetration through the floodwall.

From the current materials provided by the City there are no storm water pipes that enter the project site from Court Street.

Although there were no water mains discovered from the materials provided by the City, there are fire hydrants along both Exchange Boulevard and Court Street. There are two hydrants on the south side of Court Street and four more hydrants on the east side of Exchange Boulevard. It is likely that the water main system is below the street, therefore requiring work within the street to obtain future connections. Water taps are likely possible on both Court and Exchange.

There are no sanitary lines discovered from the current materials provided by the City for Court Street or Exchange Boulevard. Sanitary sewer is likely below the street, therefore requiring work within the street to obtain future connections.

There are no electrical utilities discovered coming from Court or Exchange from the current materials provided by the City. There is however an RG&E underground electric utility that goes through the southern portion of the site, which may need to be rerouted.

There are no communication utilities discovered coming from Court or Exchange from the current materials provided by the City.

There appears to be a gas main under the Court Street Centerline that has a service line to the RG&E hydro-electric facility at the northeast corner of Site 8. There were no gas utilities discovered on Exchange Boulevard from the current materials provided by the city.

Given the current materials provided by the City this site does fall within the Rochester District Heating service area. This means there is possible access to steam utilities.

4. Observed Encroachment

There is a permeant access easement to RG&E from Court Street that goes through the easterly portion of the site. There is also the previously mentioned RG&E underground electric utility that crosses the project site, and would need to be rerouted.

There is another permanent easement for highway purposes that traverses the southern portion of the site, and is adjacent to I-490. The project design will need to obtain permission to utilize or potentially encroach upon this space.

The two previously mentioned 42" and 72" storm sewer pipes that cross through the site. These pipes may need to be rerouted around the new building.

The Genesee Riverway Trail runs between the project site and the Genesee River. While the building does not directly encroach upon it, the integration of the design of this project with the trailway should be considered.

The 144 Exchange Boulevard building is a six story brick building along Exchange Blvd. that is to remain. While this building does not encroach upon the property of the Performing Arts Center, since it appears to be an exception piece of property it will be important to integrate the design for the Performing Art Center to complement the existing building. The building's foundation and general site requirements may need to be considered when designing this site for the Performing Arts Center.

5. Floodplain

Option 2 had been identified as being within a floodplain that spanned the majority of the southern portion of the project site. As depicted in Figure B the site is within FEMA panel 36055C0213G, and was in Zone AE, which had been determined as the 100-year flood elevation, ranging from 512 feet to 510 feet. It had also been determined that downstream of the Court Street Dam the floodplain dropped to an elevation of 507 feet and was contained within the floodwalls. However a recent letter of map revision (LOMR) done on the site, and surrounding area, has revealed that the floodplain and floodway are bound by the floodwall. Therefore the floodplain no longer encroaches onto the site.







OPTION 02 CONCEPTUAL MASSING MODEL VIEW | NE CORNER AT COURT STREET LOOKING SOUTHWEST

City of Rochester: Rochester Performing Arts Center

Economic Impact Analysis

June 2016

AMS Planning & Research Corp.

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Introduction

This report was prepared for Westlake Reed Leskosky (WRL) and the City of Rochester to assist in identifying the social and economic benefits of a new downtown Rochester Performing Arts Center.

Part I: Marketplace Input

Documents topline results from the community spending survey conducted for the purpose of gathering attitudinal and spending data for the Economic Benefits Analysis.

Part II: Economic Impact and Community Benefits Analysis

Identifies the economic benefits that a new Performing Arts Center may have on the Rochester region.

Part III: Potential Partnerships

Considers potential partnerships with other organizations and facilities in the Rochester region.

PART I: Marketplace Input

Methodology

In order to gather participation and spending data for use in the economic benefits analysis, AMS conducted a survey of arts and culture patrons in the Rochester market area.

The Patron Economic Impact Survey was administered online. It was distributed via a general web link that was provided to nine arts and cultural organizations for distribution to their mailing lists and or social media distribution channels.

There were 2,119 valid responses to the survey. Overall, the respondent pool was older, more female, and wealthier than the defined Primary and Secondary market areas for the study. This is consistent with industry trends for arts and culture related surveys.

Respondent Demographics vs Market Area Demographics

	Survey Respondents	Primary Market	Secondary Market
Population	2,119	813,432	163,351
% Female	61.0%	51.6%	50.3%
% With college degree	39.4%	35.8%	24.5%
% White	81.1%	76.4%	93.7%
% HH income above \$100k	33.0%	23.4%	20.3%
% 65 and over	26.4%	16.1%	17.8%

Key Observations

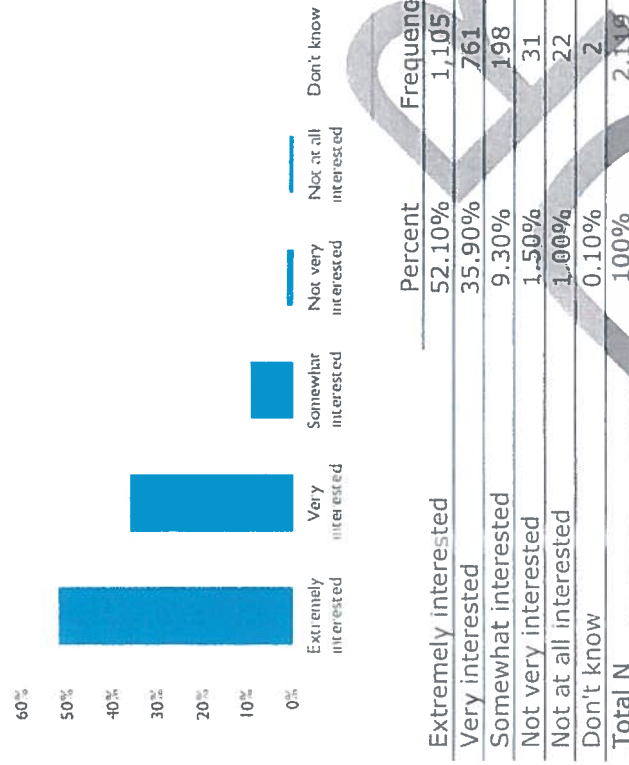
Though the purpose of the survey was to gather input for the economic impact analysis, some key observations were noted based on the responses from current arts and cultural patrons:

- 85.8% of those interested in arts and culture attend more than five performances in a typical year.
- The majority of respondents had attended a theatre performance in the past year. 47% had attended a popular music concert.
- 71.9% of respondents typically attend with their spouse or life partner and 64.1% typically attend with friends.
- 87% of respondents typically attend in groups of two to four people.
- 88.3% of respondents indicated they at least sometimes have a full meal before or after an activity.
- Food and drink and local travel are the most common items that patrons spend money on in conjunction with their attendance, followed by event merchandise.
- The difficulty of getting to an activity, cost, lack of interest, and not having time are the main factors affecting attendance for those that did not attend an event in the past year.
- 36.2% of respondents reported that they would attend arts and cultural activities more than they do currently if a new facility were built.

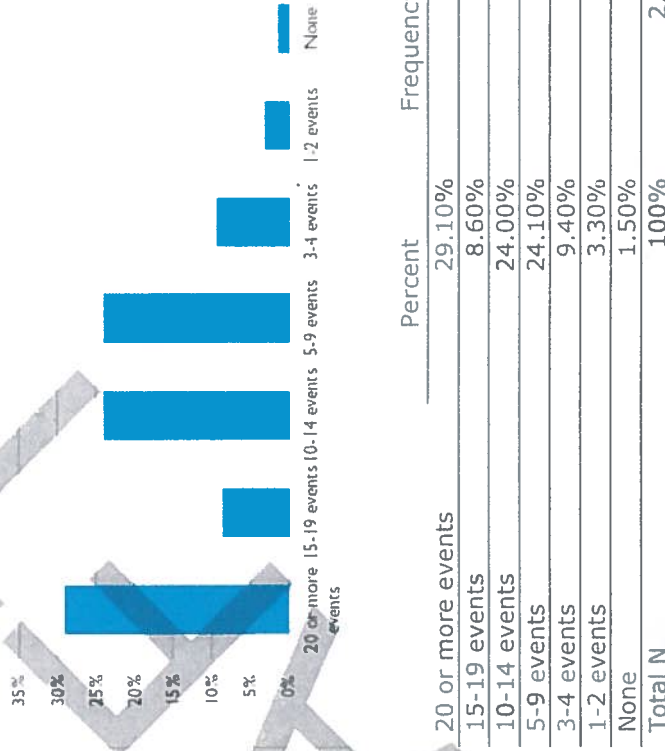
Survey Result Detail

The topline survey results from the Patron Economic Impact Survey are as follows:

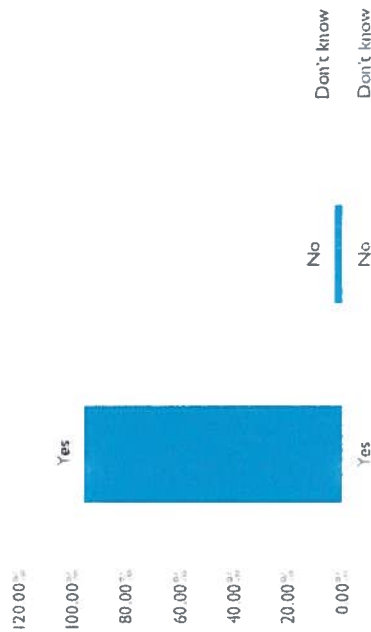
Which of the following statements describe your level of interest in arts and cultural activities? (n=2,119)



In a typical year, how many arts and cultural activities do you attend? (n=2,064)

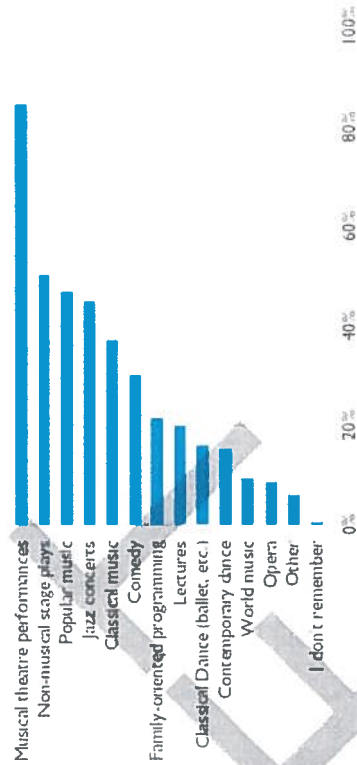


Have you attended a professional arts and cultural activity in the city of Rochester during the past year?
(n=1,973)



	Percent	Frequency
Yes	96.40%	1,901
No	3.50%	69
Don't know	0.20%	3
Total N	100%	1,973

Which of the following professional arts and cultural activities within the city of Rochester have you attended in the past year? (n=1,901)

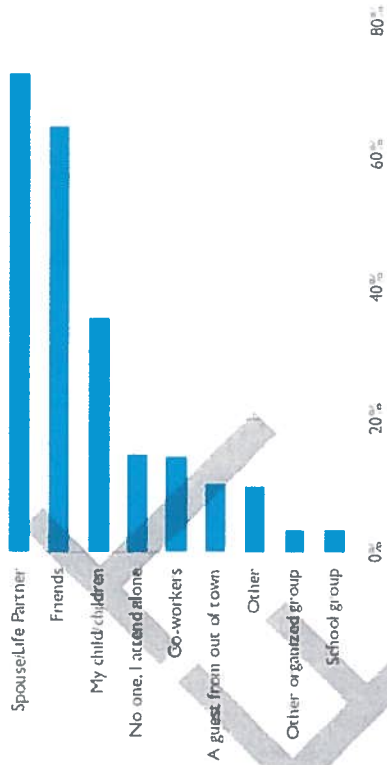


	Percent	Count
Musical theatre performances	84.40%	1,605
Non-musical stage plays	50.30%	957
Popular music	47.00%	893
Jazz concerts	45.00%	856
Classical music	37.30%	709
Comedy	30.20%	574
Family-oriented programming	21.40%	406
Lectures	19.80%	377
Classical Dance (ballet, etc.)	15.90%	302
Contemporary dance	15.20%	289
World music	9.40%	179
Opera	8.50%	161
Other	6.00%	114
I don't remember	0.60%	11
Total N		1,901

What is the average admission price that you paid per person?

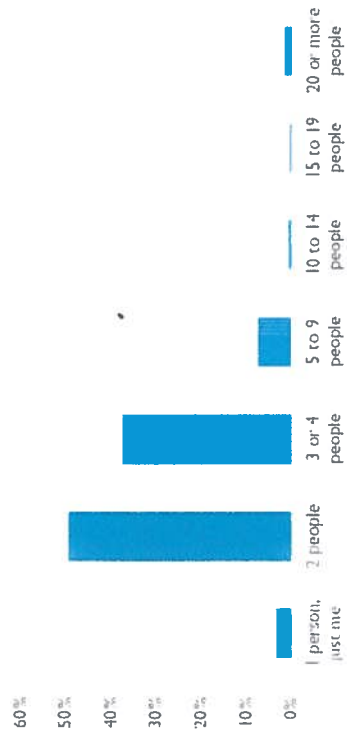
	Mean	Median	Max	Min	Valid N
Jazz concerts	\$45	\$35	\$360	\$1	635
Non-musical stage plays	\$42	\$40	\$200	\$1	897
Musical theatre	\$67	\$65	\$600	\$1	1,525
Opera	\$38	\$35	\$150	\$10	142
Classical dance (ballet, etc.)	\$43	\$40	\$120	\$1	266
Contemporary dance	\$32	\$30	\$150	\$2	241
Classical music	\$43	\$40	\$200	\$5	614
Lectures	\$23	\$20	\$130	\$1	175
World music	\$30	\$25	\$100	\$5	137
Popular music	\$61	\$55	\$500	\$1	810
Comedy	\$45	\$40	\$200	\$3	516
Family-oriented programming	\$34	\$25	\$200	\$1	330
Other	\$42	\$20	\$700	\$3	61

Who do you typically attend arts and cultural activities in the city of Rochester with? (n= 1,901)



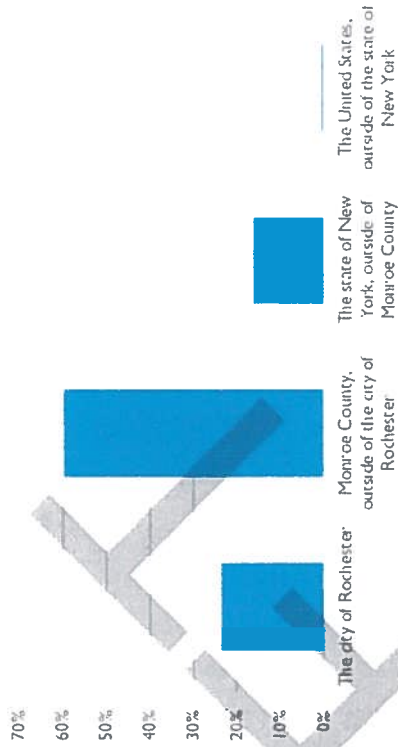
	Percent	Count
Spouse/Life Partner	71.90%	1,366
Friends	64.10%	1,219
My child/children	35.10%	667
No one, I attend alone	14.60%	277
Co-workers	14.30%	271
A guest from out of town	10.20%	193
Other	9.80%	187
School group	3.40%	65
Other organized group	3.40%	64
Total N		1,901

How many people total, on average, are in your party when you attend arts and cultural activities in the city of Rochester (including yourself)? (n=1,890)



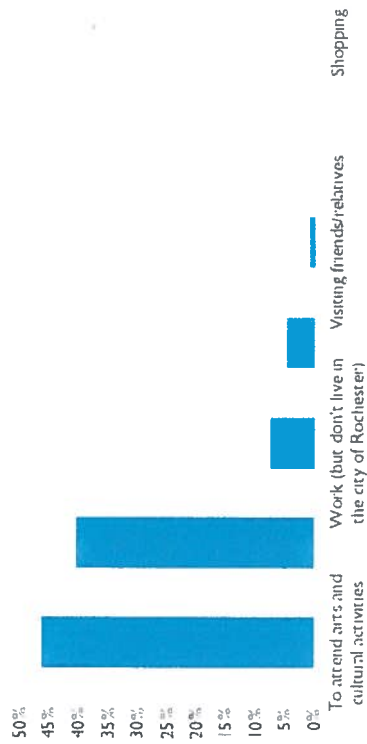
	Percent	Frequency
1 person, just me	3.30%	62
2 people	49.40%	934
3 or 4 people	37.60%	711
5 to 9 people	7.20%	137
10 to 14 people	0.60%	11
15 to 19 people	0.30%	5
20 or more people	1.60%	30
Total N	100%	1,890

Which of the following best describes you? My primary residence is: (n=1,901)

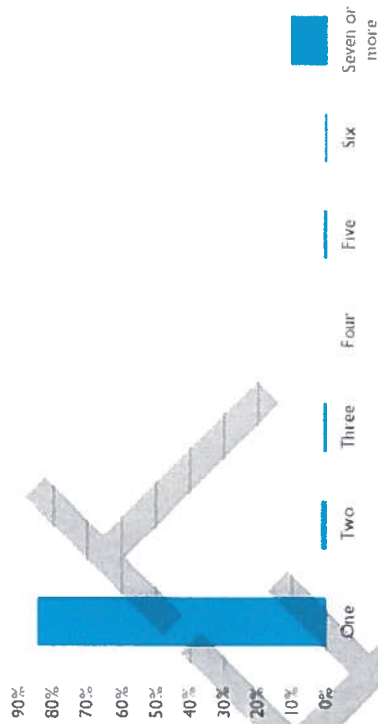


	Percent	Frequency
The city of Rochester	23.60%	449
Monroe County, outside of the city of Rochester	59.80%	1,136
The state of New York, outside of Monroe County	16.10%	307
The United States, outside of the state of New York	0.50%	9
Total N	100%	1,901

What was the primary reason you were in Rochester?
(n=1,901)



How many days were you in Rochester?? (n=1,452)



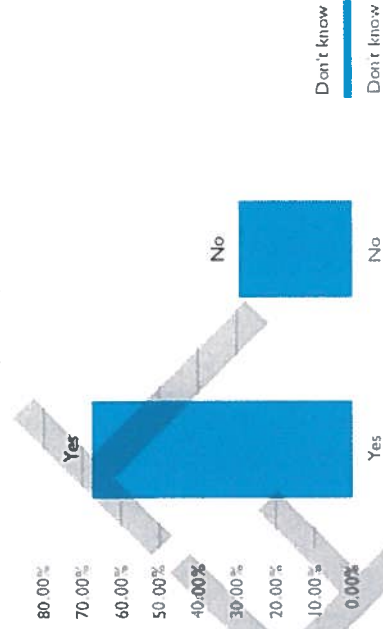
To attend arts and cultural activities	Percent	Frequency
To attend a specific venue	46.30%	672
Work (but don't live in the city of Rochester)	40.60%	589
Other	7.40%	107
Visiting friends/relatives	4.60%	67
Visiting on business	1.00%	15
Shopping	0.10%	1
Total N	0.10%	1
	100%	1,452

One	Percent	Frequency
Two	84.50%	1,227
Three	1.70%	25
Four	1.10%	16
Five	0.20%	3
Six	1.00%	14
Seven or more	0.70%	10
Total N	10.80%	157
	100%	1,452

Approximately how much money did you spend on ... in conjunction with your attendance at the activity?

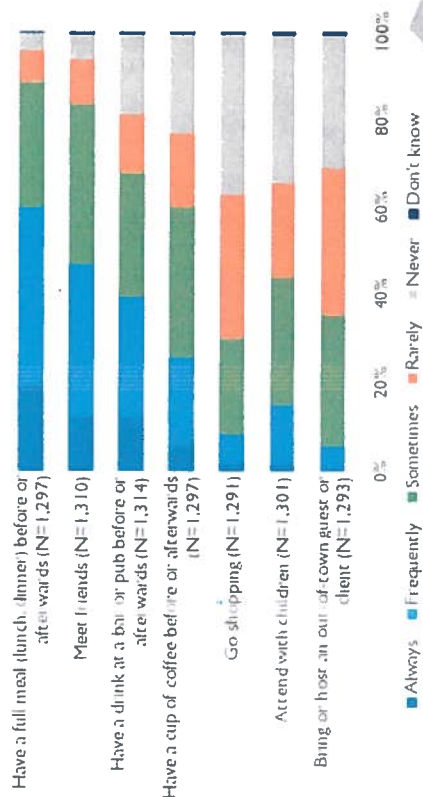
	Mean	Median	Max	Min	Valid N
Food and Drink	\$50	\$40	\$300	\$1	1,398
Long-Distance Travel	\$106	\$28	\$1,000	\$2	40
Local Travel	\$10	\$10	\$400	\$1	1,347
Lodging	\$177	\$150	\$600	\$5	23
Shopping (Before or After the Event)	\$56	\$35	\$400	\$5	178
Merchandise at the Theatre	\$30	\$25	\$250	\$1	461
Childcare (Babysitter)	\$46	\$40	\$100	\$15	76

Have you attended a professional arts and cultural activity outside the city of Rochester during the past year? (n=1,973)

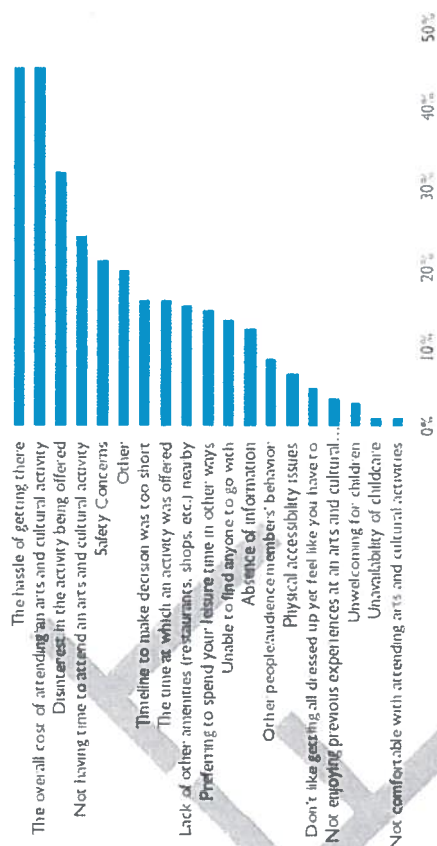


	Percent	Frequency
Yes	67.80%	1,337
No	29.90%	589
Don't know	2.40%	47
Total N	100%	1,973

How frequently do you also do the following?



Factors affecting your ability to attend an arts and cultural activity within the past year... (n=163)

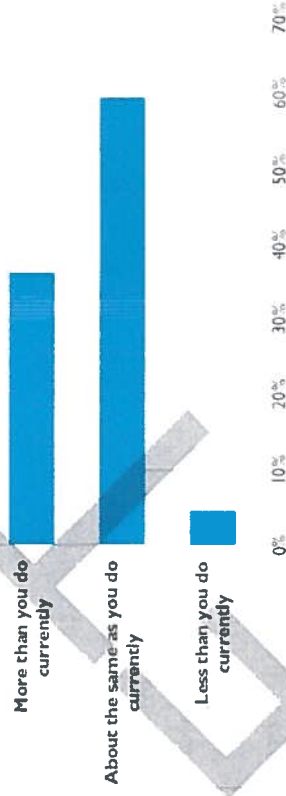


Factor	Percent
The overall cost of attending an arts and cultural activity	44.80%
The hassle of getting there	44.80%
Disinterest in the activity being offered	31.90%
Not having time to attend an arts and cultural activity	23.90%
Safety Concerns	20.90%
Other	19.60%
The time at which an activity was offered	16.00%
Timeline to make decision was too short	16.00%
Lack of other amenities (restaurants, shops, etc.) nearby	15.30%
Preferring to spend your leisure time in other ways	14.70%
Unable to find anyone to go with	13.50%
Absence of information	12.30%
Other people/audience members' behavior	8.60%
Physical accessibility issues	6.70%
Don't like getting all dressed up yet feel like you have to	4.90%
Not enjoying previous experiences at an arts and cultural activity	3.70%
Unwelcoming for children	3.10%
Not comfortable with attending arts and cultural activities	1.20%
Unavailability of childcare	1.20%
Not comfortable with attending arts and cultural activities	1.20%
Total N = 163	

Arts and cultural programming/activities you would expect from a new performing arts center... (n=2,064)



If a new downtown performing arts center was built, would you participate in arts and cultural activities...? (n=2,064)



	Percent	Count
Musical Theatre	88.80%	1,832
Non-musical stage plays	71.90%	1,483
Popular music	70.70%	1,459
Jazz concerts	68.00%	1,403
Comedy	62.30%	1,285
Family-oriented programming	60.90%	1,258
Classical dance (ballet, etc.)	56.30%	1,162
Contemporary dance	55.30%	1,141
Classical music	49.30%	1,017
World music	42.00%	866
Opera	40.50%	836
Lectures	37.10%	766
Other	5.30%	109
Don't know	3.30%	68
Total N		2,064

	Percent	Frequency
More than you do currently	36.20%	748
About the same as you do currently	59.40%	1,226
Less than you do currently	4.40%	90
Total N	100%	2,064

PART II: Economic Benefits Analysis

Background

The proposed new downtown Rochester Performing Arts Center (RPAC) is multi-venue arts center currently in the concept planning stages in Rochester, NY. The new facility will primarily be a host to presentations, rental and partner activity performances, rehearsals, educational programs, and production fabrication activity by Broadway touring shows, national and regional touring artists, and local performing arts organizations.

The planned facility, based on data provided by WRL as the concept stood in May 2016, includes a 2,850-seat main hall, a 350 seat multi-function venue, a 125-seat black box theater, multiple classrooms and rehearsal studios, and production fabrication spaces for scenery and costumes. The new facility has a planned area of 183,621 gross square feet, is anticipated to be constructed for approximately \$82.1m. An additional parking structure would add \$28.4m in construction cost. Other costs such as tax, design fees, permitting, FF&E (furniture, fixtures, & equipment), fundraising campaign costs, project management, etc. bring the total project cost to approximately \$168m.

It is anticipated that a not-for-profit entity will operate the new center, which will rely on revenues from space use and ticket handling fees, as well as contributed income from annual fundraising and other means of operational support. Center expenses include staffing, occupancy costs, and administrative overhead.

As noted in an earlier section, the current operating model for the performing arts center utilizes third parties as primary programmers. Therefore, for the purpose of estimating economic

impact, only the direct expenditures of RPAC are included in the analysis.

RPAC's operating expenditures are expected to reach \$5.4 million in a stable operating year (Year 3 – projected to be 2022). Projected expenditures would be offset by 72 percent earned revenues (\$3.9 million) and 28 percent contributed revenues from all sources private and public (\$1.6 million).

This section of our report documents the expected economic and community impact of the RPAC project during both the construction period and during a typical year as a result of the Center's operations.

PRELIMINARY ESTIMATES

As the project building program and concepts were still developing when this analysis was undertaken, only preliminary, order of magnitude estimates for economic impact are included in this version of the report, and only for Scenario 2. More detailed estimates will be prepared following review of this draft report, which will then be updated.

Economic & Community Impact of the Arts

In January 2015, the U.S. Bureau of Economic Analysis and National Endowment for the Arts updated its analysis of the impact of arts and culture on the U.S. Economy. It quantified that arts and cultural production accounted for 4.3 percent – or \$698 billion – of GDP in 2012 (in comparison, the estimated value of the U.S. travel and

tourism industry was only 2.8 percent of GDP).¹ The performing arts industry alone employed 104,000 workers who collectively earned \$7 billion dollars.

The majority of traditional economic impact studies undertaken by arts and cultural facilities and communities focus only on the direct and indirect impacts of organizational and venue spending, and the directly-related ancillary expenditures of audiences and visitors (e.g. spending on food, parking, and accommodation). AMS's work in communities similar to Rochester has demonstrated that arts facilities also provide significant community development benefits, both in terms of dollars spent and re-spent within the regional economy, as well as the improvement of cultural vitality.

The Urban Institute's Arts and Culture Indicators in Communities Project has developed both a comprehensive definition of cultural vitality and tools for its measurement.² ACIP's basic premises are (a) that a healthy place to live **includes opportunities for and the presence of arts, culture, and creative expression**, (b) that arts, culture, and creative expression are **important determinants of how communities fare**, and by extension (c) that full understanding of U.S. communities is inherently impossible without including these important perspectives.

This definition of "cultural vitality" comprises three elements:

- Facilitating the presence of **opportunities** for cultural expression.
- Enabling **participation** in arts and cultural activity.
- Providing **support** for cultural participation.

Through its economic impacts and its contribution to these elements of cultural vitality, RPAC will make a demonstrable contribution to both the economy and quality of life in the Rochester community.

Economic Impact of a New Performing Arts Center

Americans for the Arts released its study of the economic impact of the arts in 182 cities nationally in 2012. The study, updated in 2015 as *Arts & Economic Prosperity IV (AEP IV)*, is being repeated for the fifth time in 2016 in as many as 500 cities. (*AEP IV*) is a study of the nonprofit arts and culture industry's impact on the economy.³

Using the same methodology as *AEP IV* and the local data gathered in the survey, AMS engaged Americans for the Arts to quantify the direct and indirect economic impact of the proposed Rochester Performing Arts Center.

AMS, in collaboration with Americans for the Arts has prepared two preliminary estimates of economic impact for the RPAC project. The first assessing the impact of construction project for Scenario 2 and the second, a preliminary estimate of the impact of

¹ Americans for the Arts. *Arts Data Profile #6: The 2014 Arts and Cultural Production Satellite Account: 1998-2012*. <http://arts.gov/artistic-fields/research-analysis/arts-data-profiles/arts-data-profile-6/arts-data-profile-6>, Accessed 1 Nov 2015.

² Rosario-Jackson, Maria, Florence Kabwasa-Green, and Joaquin Herranz. *Cultural Vitality in Communities: Interpretations and Indicators*. The Urban Institute, 2006.

<http://www.urban.org/research/publication/cultural-vitality-communities-interpretation-and-indicators>, Accessed 1 Nov 2015.

³ Americans for the Arts. *Arts and Economic Prosperity IV: Economic Impact of the Nonprofit Arts & Culture Industry*. 2012.

<http://www.americanforthearts.org/by-program/reports-and-data/research-studies-publications/arts-economic-prosperity-iv/download-the-report>
Accessed June 2016.

operations in a typical year (Year 3, the Base Year of stabilized operations). Using forecasts prepared by WRL, Americans for the Arts (AFTA) economists applied its sector-specific model to quantify the construction of RPAC and the related economic impact.

For the preliminary estimate of the impact of operations, AMS utilized operating revenues and expenses forecasted in the pro forma operating estimate prepared to model RPAC's first ten years of operations. It should be noted that the economic impact from operations reflects RPAC expenditures only; it does not include the impact from expenditures by rental clients enabled by the presence of the center, which would provide their own, added economic benefit (a touring Broadway show, for example, rents hotel rooms, the cast uses local restaurant, etc.).

Direct and Indirect Economic Impact

To estimate economic impact, AMS and Americans for the Arts use a type of economic model known as an input/output model. An input/output model is a way to measure economic impact by looking at how each dollar spent by an arts organization and its audiences flows throughout the local economy. Direct economic impacts of an arts organization's spending are relatively easy to quantify. An organization's total expenses, spent on everything from copy paper to electric utilities, provides direct impact to the local economy. Similarly, audience spending on everything from a dinner out to babysitters also produces direct economic impact.

This model also includes indirect economic impacts, which are an expression of the true total impact of this kind of spending. When a person spends money on a ticket or an organization buys supplies, the impact doesn't stop there – that money is “re-spent” in the local economy many times.

For example, if an arts organization buys paint from a local hardware store for \$50, a portion of that \$50 goes to pay employees, some goes to pay bills, and some of it is used to buy more goods to sell. But then the store's employees buy groceries at the supermarket, which pays its cashier. The cashier spends his/her pay on rent, and so on.

So the \$50 purchase turns into more local spending (by the hardware store and its employees, the supermarket and its employees etc.). Eventually, the \$50 ends up outside of the local area and ceases to have a local economic impact. But it is possible to measure how long this takes, and work out the local economic impact of that \$50.

Since each community is different, Americans for the Arts creates a customized Input/output model for each community using data from local and federal governments along with survey data from local arts organizations and their audiences.

RPAC's Economic Impact

Two preliminary estimates of economic impacts have been calculated. First, the impact of the construction phase was calculated using capital cost estimates developed by WRL on behalf of the City of Rochester. Then, the economic impact of a typical year of operation of the center was calculated combining the pro forma operating estimate developed by AMS and a proxy for audience spending. The subsequent modeling will include actual spending which was calculated based on the patron survey detailed in Part I above.

Preliminary Economic Impact Summary

Construction

The draft project cost estimate for the Rochester Performing Arts Center (Scenario 2) is \$167.9 million dollars. Of this amount, WRL and their cost estimators forecast that 80% (\$132.9) will be spent locally (within Monroe County). The majority of these dollars (\$86.7 million) are projected to spent for payroll and payroll related expenses. It is projected that all payroll will be local.

Based on these forecast expenditures, the table below documents the direct economic impact of the construction of RPAC Scenario 2:

ROCHESTER PERFORMING ARTS CENTER – ECONOMIC IMPACT OF CONSTRUCTION – SCENARIO 2 (Preliminary)

Total Spending		\$167,900,000
Local Direct Expenditures		\$132,906,312
Direct Economic Impacts		
Direct Local Government Revenue	Full-time equivalent jobs	2,140
	Local Sales Tax	\$2.5 million
	Building and Construction Permits / Fees	\$2.6 million
	Other Local Government Revenue / Fees	\$3.3 million
		\$8.4 million
Direct State Government Revenue	State Sales Tax (4%)	\$2.5 million
	State Income Tax (6.4%)	\$5.6 million
	Other State Government Revenues / Fees	\$3.6 million
		\$11.7 million
Total Economic Impacts		
Total Local Industrial Activity Generated		\$255.7 million
Full-time Equivalent Jobs		4,638
Resident Household Income		\$107.9 million
Local Government Revenue		\$12.1 million
State Government Revenue		\$11.8 million

Operations

An initial estimate of the economic impact of operations of Scenario 2 has been developed based on the forecast for 'Base Year' operating activity and attendance as well as estimated audience expenses drawn from Americans from the Arts national database. This estimate will be updated utilizing actual spending data for Monroe County shortly.

To derive the most reliable economic impact estimates, input-output analysis was used to estimate the economic impact of expenditures by the Rochester Performing Arts Center and its audiences. The models trace how many times a dollar is re-spent within the local economy before it leaks out, and it quantifies the economic impact of each round of spending. This form of economic analysis is well suited for this study because it can be customized

specifically to each study region. To complete the analysis for the City of Rochester, project economists customized an input-output model based on the local dollar flow between 533 finely detailed industries within the economy of Monroe County. This was accomplished by using detailed data on employment, incomes, and government revenues provided by the U.S. Department of Commerce (County Business Patterns, the Regional Economic Information System, and the Survey of State and Local Finance), local tax data (sales taxes, property taxes, and miscellaneous local option taxes), as well as the survey data from the responding nonprofit arts and culture organizations and their audiences.

Based on this initial analysis, the preliminary estimate of the impact of annual operations of the performing arts center is projected as follows:

ROCHESTER PERFORMING ARTS CENTER – ECONOMIC IMPACT OF OPERATIONS – SCENARIO 2 BASE YEAR (Preliminary)

	Total Expenses (annual – Base year)	
Economic Impact (Operations)	Projected attendance	\$5.42 million
	Full-time equivalent jobs	274,000
	Household Income	180
	Local Government Revenue	\$4.6 million
	State Government Revenue	\$0.22 million
Economic Impact (Audiences)		\$0.29 million
	Full-time equivalent jobs	166
	Household Income	\$3.4 million
	Local Government Revenue	\$0.32 million
	State Government Revenue	\$0.38 million
Total Economic Impact (Annual)	Full-time equivalent jobs	346
	Household Income	\$8.0 million
	Local Government Revenue	\$0.54 million
	State Government Revenue	\$0.67 million

Definitions

Total local industrial activity generated is the total direct expenditures plus the total estimated number of times those original dollars are re-spent in Monroe County before they "leak out" of the County's economy. Full-time equivalent jobs describes the total amount of labor employed; economists measure FTE jobs, not the total number of employees, because it is a more accurate measure that accounts for part-time employment. Resident household income (often called personal income) includes the salaries, wages, and proprietary income paid to residents of Monroe County. It is the money that residents earn and use to pay their living expenses. Revenue to local and state government includes revenue from taxes (e.g., retail/sales tax, lodging tax, personal property tax, real estate property tax) as well as funds from license fees, utility fees, filing fees, and other similar sources. For the purpose of this project, the economic model was programmed to use the most currently available tax rates for Monroe County (e.g., 4.0 percent state sales tax, 4.0 percent local sales tax, 14.0 percent lodging tax, and 6.45 percent personal income tax (marginal)).

Notes and Exclusions

The above economic impact figures are conservative estimates of the total economic impact that RPAC will have. In addition, some sources of economic impact that may arise as the result of operations of the center were deliberately excluded from the model. Excluded sources are:

- Spending by visiting companies and artists
- Spending by resident companies and other users
- Spending on third party services providers (i.e. caterers) by event users of RPAC

PART III: Potential Partnerships

Potential Partners

A new performing arts center built by the City of Rochester would provide the city with multiple opportunities for partnering with local organizations. Partnerships could take many forms, however they would typically fall into the following categories: operating partners, programming partners, marketing partners, joint services partners, and event partners.

Operating Partnerships

The financial plan for RPAC considers operation by an independent non-profit entity, agnostic to ownership of the building and land which is assumed to be retained by the city. Though an operator is still to be confirmed, RBTL would be a potential candidate to operate the facility through a management agreement with the city, based on their experience with ownership and operations of the Auditorium Theatre. Other partnership options include the creation of a new not-for-profit entity or partnering with another existing arts organization for management services.

In addition, some of the existing performing arts organizations have expressed interest in partnering with the City to manage and operate specific spaces within the facility with exclusive year-round access and the ability to manage rental activity within the space. These agreements could be considered for the proposed fabricated spaces, the 125-seat or 300-seat venues, or the community-focused suite of educational and rehearsal space.

Programming Partners

The financial plan assumes the facility is primarily a host venue to local and regional not-for-profit performing arts organizations and for-profit promoters.

The center itself would engage in limited presenting, but would partner with promoters for the Broadway series and co-presented popular entertainment in order to encourage activity in the facility. NAC Entertainment is the current Broadway presenter in the Rochester market and would typically continue this service under a partnership contract with RPAC's operators. Potential partners for concert and variety programming include LiveNation, Elite Entertainment, and other local, regional, and national promoters.

The financial plan also currently assumes partnerships with RBTL and Geva Theatre for use of the rehearsal studio, classrooms, and venues for educational activity. Other performing arts organizations may also be interested in partnerships to bring educational activity to the center which should be developed by the management entity.

Marketing Partnerships

The new performing arts center may consider joint marketing efforts with other area performance venues and festivals. Efforts may include a partnering with the Rochester Jazz Festival or the Rochester Fringe Festival to promote events at the center during those events, a Rochester-wide calendar of arts events encompassing multiple venues, joint marketing to promote Rochester arts and culture as a whole, or other initiatives that would be beneficial to all organizations involved. RPAC could also reach out to convention and tourism entities, such as Visit Rochester and, the New York State Division of Tourism, as potential marketing partners.

Joint Services

The new center could consider partnering with other existing venues and arts organizations to share operational activities such as box office and ticketing services, management of rental spaces, or shared purchasing. Shared services have proven a very effective mechanism to improve customer service, lower costs and drive increased attendance. The best-in-class example is the shared services operation of the Pittsburgh Cultural Trust. These efforts would need to be studied further to determine interest, feasibility, and potential costs and benefits.

Event Partnerships

RPAC could partner with area event venues and planners to provide joint services that would allow for additional amenities for organizations and individuals planning conventions and large scale events. For example, The Rochester Riverside Convention Center would be interested in partnering to use the proposed 2,850 seat hall for large scale meetings and events in conjunction with activities taking place in the convention center. These partnerships cannot be quantified until the site for the new center is selected, as these types of partnerships would be based on proximity.

MEETING NOTES

Client: City of Rochester
Project: Rochester Performing Arts Center
Comm. No.: 15114.00
File No.: B01

Purpose: Rochester Broadway Theatre League Programming
Location: The Auditorium Theater
Meeting Date: 2/23/2016
Date of Notes: 2/24/2016
Time: 8:30-Noon

Present	Distribution	Name	Company/Department	Email
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	X	Danielle Boyke	AMS	DBoyke@AMS-Online.com

AUTHOR: Raymond Kent

NOTE: The following meeting notes constitute our understanding of the items discussed. Unless Author is notified of any additions and/or corrections within five (5) days after receipt, the following is assumed complete and correct.

MEETING NOTES

Continued

NO.:	ITEMS DISCUSSED:	ACTION REQ'D BY	TARGET DATE
1	Looking for 2700-3000 seat venue to accommodate current programming and desired program		
2	Interested in presenting pre packaged just off Broadway tour premiers - scenery, automation, etc built off site assembled on site		
3	Ideal stage size: Proscenium 55'-60' W, plaster line to upstage wall 60', wing space 30' each side clear		
4	Current pit is has no lift other than for the organ console. Consists of infill platforms. Ideally in new space pit would like a motorized operable pit, Currently they tightly fit 20musicians. Requested 12-15 musicians typical		
5	Need musician warm up/rehearsal space and musician waiting area/conductor room— there is none at the moment		
6	Currently mic all musicians. Due to pit size and lack of operability drummers or brass may go under stage to avoid overpowering audience.		
7	Existing pipe organ functions and is used by Rochester Organ Society for performances of organ music and with film		
8	Current dressing rooms are scattered makeshift spaces through the back of house. Ideally there would be: Chorus dressing stations - 3 six person, 2 twelve person, 2 fifteen person rooms desired. Four star dressing rooms. ADA/Star dressing room on stage		
9	There is currently no way for audience to access to stage from house unless stairs are built at the ends of the aisles. Interested in better access. People marshal out in the main corridor to enter from off stage in current space.		
10	Desire to have "in-house audio/video" for smaller shows like comedians including image magnification (IMAG) for display on projection screen		
11	There is very little in the Auditorium Theatre in regards to FOH rigging and lighting points. There are several places in the ceiling where riggers feet have fallen through the plaster ceiling while hanging points. Points for touring audio systems and other rigging is a must. There are temporary light perches in the balcony left/right that are in adequate for FOH lighting.		
12	Desire for split dimmer package/branch circuit package. Currently a touring dimmer rack is cabled to the lighting positions. Portable branch circuits are required for automated or solid state theatrical lighting.		
13	Lighting/audio storage - desirable with maintenance room. Current facility has very limited lighting and audio storage and no dedicated maintenance space.		
14	There are not SL/SR fly rails on stage. Pin rail is at SL on the stage deck. It is removed for some shows limiting spot flying capability. Fly rails are a desire for the new space.		
15	Current rigging is T-Track single purchase manual counterweight. With 60 line sets 6" on center. T-Track system came from another venue and was installed by local rigging IATSE stagehands. Desire is to have similar number of manual counter weight		
16	Access to the metal grid floor is from ladder access that has not intermediate landings per OSHA requirements. Deisre is an elevator to loading bridge/grid		
17	Backstage crew currently using dressing rooms or under stage trap area for breaks or in between tasks during a show. Desire is for a dedicated space with a toilet.		
18	House mix - current 12x18 located in main auditorium just under center front balcony. Used for audio and projection		
19	Stage management run from house mix or stage		
20	No current piano storage. Desire is for on-site conditioned piano storage		
21	Current road box storage is on the trucks or in the main back-of-house corridor which has a slop to it. If the corridor is used it necessitates a fire watch by the fire marshal. Need for marshalling and staging storage!		
22	Make-up wig prep is found space depending on the show. Need dedicated make-up/wig space prep		
23	Current laundry - 3 washers 3 dryers to meet Actors Equity requirements. Lacks proper ventilation and hot water source		
24	Catering happens in found space or is food trucks in the back parking lot. Desire is for a min of prep area/warming kitchen. Ideal is a full kitchen (central		

MEETING NOTES

Continued

	or relationship with in-house restaurant) would serve concessions and performer support		
25	Rehearsal spaces currently are found space. Desire is (1) full stage size dedicated, (1) dance warm-up/rehearsal, (1) multi-purpose (education master class)		
26	Desired offices - 5000#ft. more private than open office. currently 6 closed, 7 open. Current offices have no natural light and have no easy access to the auditorium. Current conference room is too small (fits 8 ppl tight) Conference room with room for 15-20 with video conferencing and presentation capability		
27	Current box office (currently 3 full time) - need 4 desks.		
28	No current location for staff lunch/break. Need staff break/lunch room. would like a shower locker room for staff as well since there are many staff who work long hours (14+)		
29	Currently (1) box office wicket used for single ticket sales and will call. 3-4 wickets desired - will call, single ticket, press, etc		
30	There is no current counting room for the box office? May not need separate space due from Box Office due to lack of actual cash being used. -- mostly on-line and CCD		
31	IT is vital! - wired and wireless for box office, concessions, merch table POS. Ticket readers are wireless. In auditorium for design staff, back stage for automation, audio, lighting. Private/public network desired. Bandwidth is the main current issue along with distribution		
32	Hearing assist - currently have IR system - maxing out capability. Interested in RF or better system. Must be two channel minimum for hearing and visually impaired		
33	Back of house production staff are found space. Desire for offices 5-6 temporary, 2-3 permanent		
34	Security - stage door security with desk- card access, camera systems		
35	Current FOH staff have no home. Desire is for house manager to have an office and usher/concessions to have a common space lounge to go to before and during shows		
36	There is a need private room 100# ft approx for medical emergencies		
37	Lobbies have no technology. Desire to do presentations in the lobby areas		
38	Current lobbies' sizes are inadequate. Need to increase. Currently having to stage patron access to avoid hitting occupancy limit as patrons arrive		
39	Janitorial closet needed every level. Currently services are contracted with no office. Would desire office space for potential in-house staff		
40	Loading dock doors (2) lead to the parking lot just behind the theater. Parking lot is inadequate to accommodate several trucks. The theater does not have control over this lot. Staging must be off loaded onto parking lot surface then brought into the theater. Desire is to have dock height load-in to the venue - 3-truck minimum with large staging area inside the dock doors. Could double as storage during show.		
41	No on-site scenery fabrication. Done onstage now or in the parking lot. need small fabrication shop.		
42	Require a full stage drapery package - legs, borders, mid-stage traveler, cyclorama, scrim, main curtain and valence.		
43	Desire is for a line set mounted projection screen		
44	Need projector location - currently set up on the balcony rail or in the balcony - fan noise and weight is an issue.		
45	VIP/donor lounges are very important for fundraising and revenue- need concessions and access to kitchen. desire on two levels could double during day for education, board meetings or other events		
46	Most shows sit downs are 1 week. There are however one-nighters with many trucks. (Tyler Perry)		
47	Local rentals are about 10% of sit downs - include dance troupes/competitions, high school graduations, etc.		
48	RBTL has a desire to maintain running Auditorium Theater possibly for small shows and for more local performances		
49	Enclosed space for special needs patrons (crying room) - There is currently an outreach for special needs community.		
50	Desire outdoor digital signage branding to bring life and movement to exterior		

MEETING NOTES

Continued

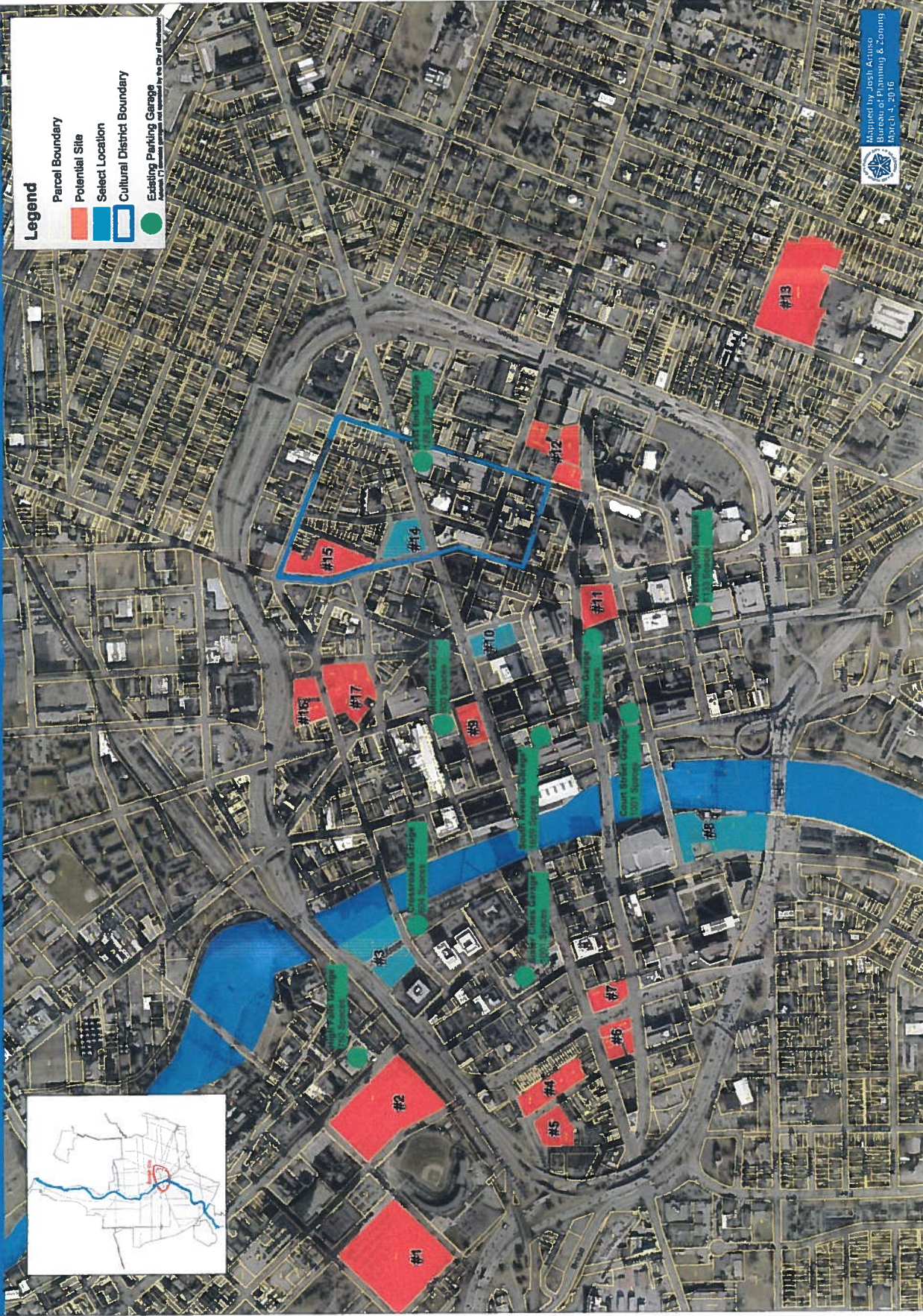
	of building at night and transparent facade to show activity during the day.		
51	Desire for green space - temporary stage -mini amphitheater for daytime performances of music? with support services from within the venue.		
52	Rooftop terrace for VIP amenity?		
53	Need Sign language interpreter space.		
54	Site- car/bus unloading/drop off areas for patrons Currently have none		
55	FOH storage is non-existent - merch tables, stanchions, wheel chairs, etc need a place to go when not in use.		

Potential Performing Arts Center Sites in Center City - Rochester, NY



Legend

- Parcel Boundary
- Potential Site
- Select Location
- Cultural District Boundary
- Existing Parking Garage



Mapiped by Josh Ariuso
Bureau of Planning & Zoning
March 3, 2016

Survey of Sites

Measurements

An acoustic survey of each of the 17 potential sites was performed on 4/13/16 - 4/14/16. The goal was to generally quantify ambient sound levels due to traffic, train, and other environmental noise sources as well as observe existing conditions to subjectively evaluate the sites for impact of these ambient sounds on the potential siting of a performing arts center. Multiple measurements were taken on each site, each lasting approximately 10 minutes.

It is important to note that these short term measurements are a snapshot in time, and are not sufficient to design the façade and envelope of a building for proper sound isolation, but they provide useful information for comparison of each site and a better understanding of what sound sources would affect each site. Longer term measurements on the selected site would be required for future understanding of ambient noise trends over time of day, capture true maximum sound levels over longer time periods, and analysis of ground borne vibration on some sites to determine potential train impact.

Summary Analysis for each Site

Below for each site the following information has been summarized:

- A satellite map of the site - This shows the loudest contributing steady state noise sources. Roads are marked in RED and train lines marked in BLUE. The areas notated have "line of sight" to the potential building site and are controlling the sound levels at the site. The parts of these sites closest to these noise generating elements are the loudest. In potentially designing an acoustically sensitive building on each of these sites, it would be ideal to locate acoustically sensitive spaces away from these noise producing areas.
- Leq – Average sound level measured over the measurement period, in this case approximately 10 minutes at each measurement location. A range is shown when there was a difference for measurement locations in different areas of the site(s).
- Lmax – The instantaneous single loudest "event" measured at each site as well as the "event" causing this maximum level. These "events" are typically short term and do not really affect the average (Leq), however sound isolation design must consider steady state noise as well as instantaneous events.
- Relative Level of Noise Mitigation Required – This is a relative metric for the extent of sound isolation construction that would be required to meet a typical concert hall background noise and takes into account maximum levels measured, low frequency sound content, and traffic speeds. This is not a cost estimate and is only shown for site comparison sake.

Site 1: Carestream Parking Lot



- Leq range: **55-63 dBA**
- Lmax – **84 dBA** (train horn)
- Area of site with highest ambient noise – South
- Area of site with lowest ambient noise - North

Notes:

- Sound levels generally controlled by traffic on I-490. Elevated roadway blocks line of sight to some vehicle tires which are primary noise generators. A tall building may see sound levels higher than measured at grade. Train noise (both horn and engine) was audible but traffic was still the controlling factor in the ambient noise.
- Noise from increased activity when the baseball stadium is active would be a concern (increased traffic, generator trucks, tailgating, noise from the stadium announce system, etc.) but there was no activity at the park during our survey.

Relative Level of Noise Mitigation Required - **HIGH**

Site 2: Kodak / County Parking Lots



- Leq range: **58-66 dBA**
- Lmax – **84 dBA** (truck on State St)
- Area of site with highest ambient noise – Southwest
- Area of site with lowest ambient noise - Northwest

Notes:

- Sound levels generally controlled by traffic on I-490 but there was significant noise from trucks on State St. Elevated roadway blocks line of sight to some vehicle tires which are primary noise generators. A tall building may see sound levels higher than measured at grade. Train noise (both horn and engine) was audible but traffic was still the controlling factor in the ambient noise. Noise from increased activity when the baseball stadium is active would be a concern (increased traffic, generator trucks, tailgating, noise from the stadium announce system, etc.) but there was no activity at the park during our survey.

Relative Level of Noise Mitigation Required - **HIGH**

Site 3: RG&E Front Street Site



- Leq range: **63-69 dBA**
- Lmax – **86 dBA** (train engine)
- Area of site with highest ambient noise – North/East/West
- Area of site with lowest ambient noise - South

Notes:

- Sound levels controlled by traffic on I-490, and did not vary much across the different areas of the site. Elevated roadway and jersey barriers block line of sight to some vehicle tires which are primary noise generators. A tall building may see sound levels higher than measured at grade. Train engine noise was significant when present.

Relative Level of Noise Mitigation Required – **VERY HIGH**

Sites 4/5: Cascade District – East / West



- Leq range: **56-60 dBA**
- Lmax – **92 dBA** (local construction equipment noise)
- Area of site with highest ambient noise – North
- Area of site with lowest ambient noise – Site 4 portion (south/east) of site

Notes: Primary noise generator is I-490 and access ramps. Train noise (both horn and engine) was audible but traffic noise was still controlling. Site 4 portion of plot has significant shielding from local (Main St) road noise sources.

Relative Level of Noise Mitigation Required – **HIGH**

Sites 6/7: Broad / Plymouth Parking Lots – West / East

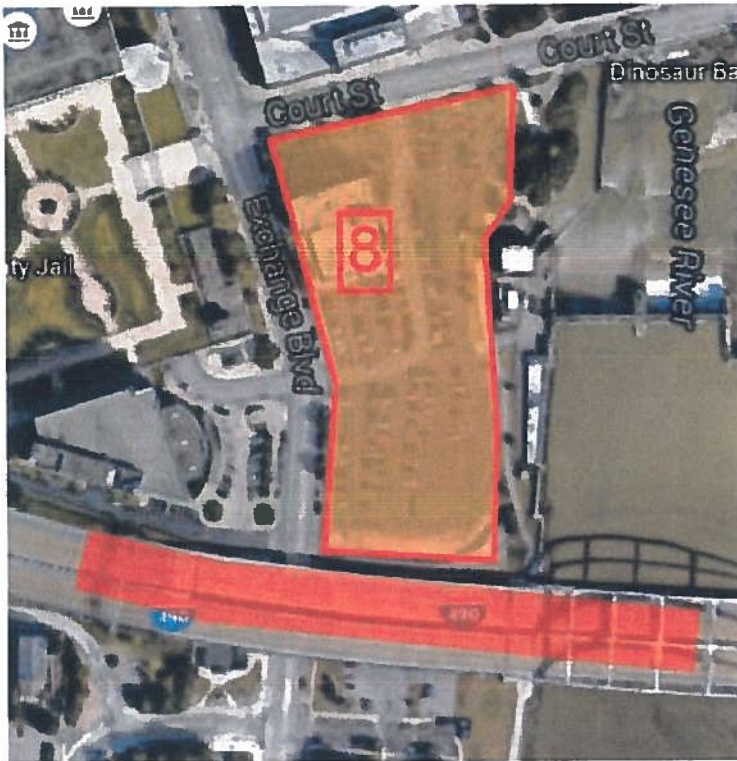


- Leq: **58 dBA**
- Lmax – **96 dBA** (music from loud car stereo pass by)
- Area of site with highest ambient noise – Leq was consistent across site
- Area of site with lowest ambient noise - Leq was consistent across site

Notes: Sound levels generally controlled by traffic on Main St but were consistent across all areas of the site. Bus stop on Main St had significant low frequency noise.

Relative Level of Noise Mitigation Required – **HIGH**

Site 8: Court / Exchange Riverside Site



- Leq: **58-67 dBA**
- Lmax – **89 dBA** (Truck on I-490 bridge)
- Area of site with highest ambient noise – N/A - consistent
- Area of site with lowest ambient noise - N/A - consistent

Notes: Sound levels generally controlled by traffic on I-490 and bridge but mostly consistent across the majority of the site due to the elevated nature of the highway. Only the far north end of the site starts to see a reduced ambient noise level. Noise levels at elevations above grade would be expected to be significantly higher as line of sight to noise source (vehicle tires) on bridge increases. Noise from vehicles crossing expansion joints on the bridge were frequent as well as “jake brakes” from trucks decelerating, and local traffic on Exchange St.

Relative Level of Noise Mitigation Required – **VERY HIGH**

Site 9: Main / Clinton (Former Renaissance Square Site)



- Leq: 67 dBA
- Lmax – 95 dBA (truck on Main St)
- Area of site with highest ambient noise – Main St/ Clinton Ave
- Area of site with lowest ambient noise – North

Notes: Accessible site area has consistent ambient noise levels along Main St. Construction noise from busses and trucks accelerating from intersections was frequent. Division St. has significant noise from delivery truck traffic and trucks idling.

Relative Level of Noise Mitigation Required – **VERY HIGH**

Site 10: Parcel 5 – Midtown Redevelopment Site



- Leq Range: **55- 64 dBA**
- Lmax – **82 dBA** (truck on Main St)
- Area of site with highest ambient noise – Main St
- Area of site with lowest ambient noise – South

Notes: Sound levels drop off rapidly as distance from Main St increases due to building shielding, and low traffic volume/speed on local surface streets. South side of site has minimal loud "events" such as bus or truck passbys.

Relative Level of Noise Mitigation Required – **HIGH**

Site 11: Xerox Auditorium

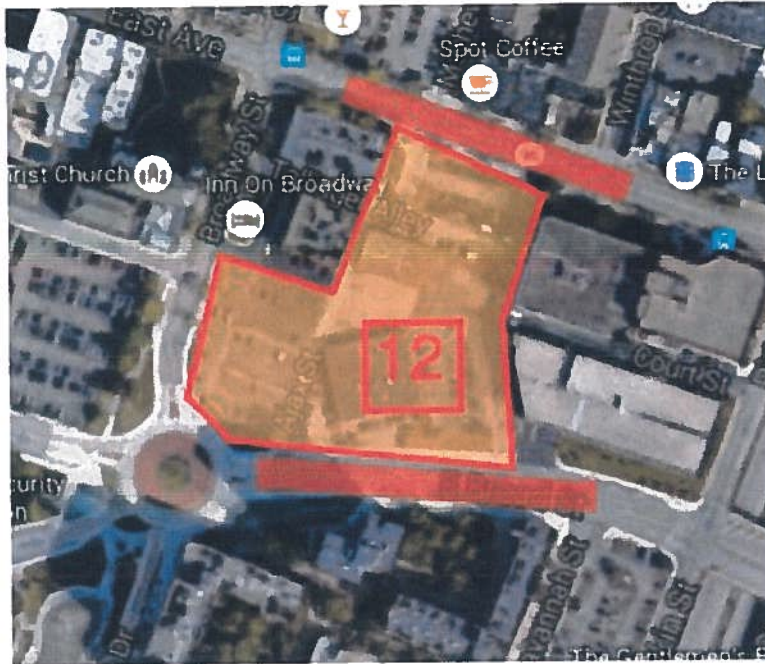


- Leq : **63 dBA**
- Lmax – **84 dBA** (general traffic noise)
- Area of site with highest ambient noise – N/A - consistent
- Area of site with lowest ambient noise – N/A - consistent

Notes: Sound levels were consistent as site is surrounded by busy urban corridor

Relative Level of Noise Mitigation Required – **MODERATE**

Site 12: Broad / Broadway / East Ave Site



- Leq : 61 dBA
- Lmax – 81 dBA (general traffic noise)
- Area of site with highest ambient noise – East Ave
- Area of site with lowest ambient noise – East and West sides of sites

Notes: Significant construction noise on Pitken St area was present during our visit. East Ave Traffic would have the most impact at higher traffic speeds than East Broad St. Significant portions of the site are shielded from traffic noise sources.

Relative Level of Noise Mitigation Required – **MODERATE**

Site 13: Alexander Park Site

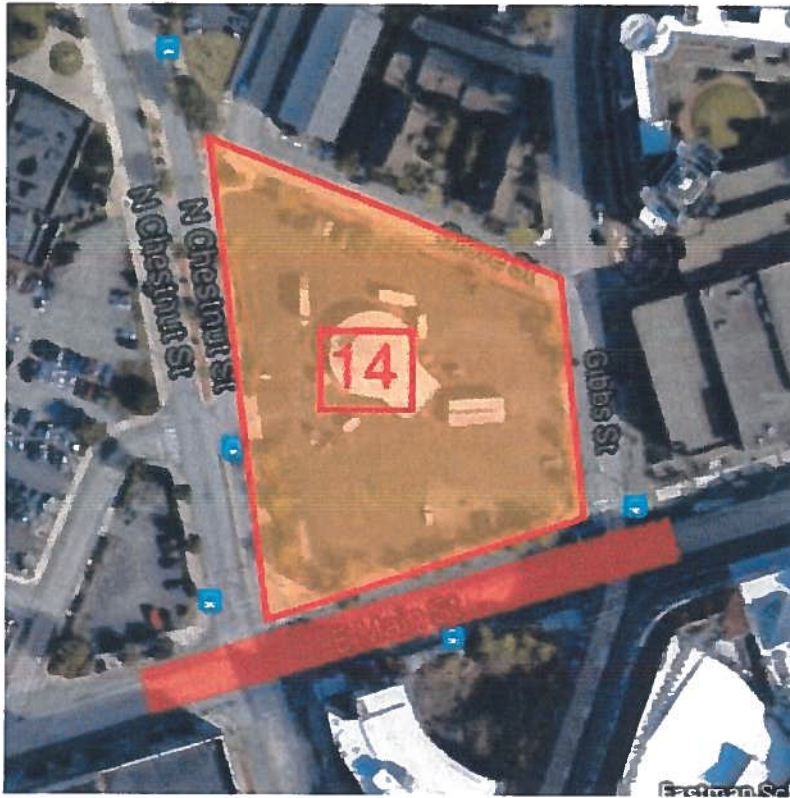


- Leq : **55-63 dBA**
- Lmax – **88 dBA** (general traffic noise)
- Area of site with highest ambient noise – Alexander St
- Area of site with lowest ambient noise – East side of site

Notes: Low traffic speeds, and lack of trucks in a residential area. Alexander St. traffic controls ambient noise levels, and the rest of the site is quiet with minimal noisy urban “events” causing high instantaneous noise levels.

Relative Level of Noise Mitigation Required – **MODERATE**

Site 14: "Block F" Site



- Leq : 57-65 dBA
- Lmax – 86 dBA (bus traffic)
- Area of site with highest ambient noise – East Main St. Frontage
- Area of site with lowest ambient noise – N/A - consistent

Notes: Bus traffic along East Main St was the controlling factor in ambient sound levels. Significantly lower ambient sound levels in the Gibbs St/Grove St area.

Relative Level of Noise Mitigation Required – **HIGH**

Site 15: 150 Chestnut Street Site



- Leq : **58 dBA**
- Lmax – **74 dBA** Truck on University Ave
- Area of site with highest ambient noise – North and West Frontage
- Area of site with lowest ambient noise – Grove St Frontage

Notes: Bus traffic along East Main St was the controlling factor in ambient sound levels. Significantly lower ambient sound levels in the Gibbs St/Grove St area. Traffic on Loop Road audible but did not control the overall ambient sound levels.

Relative Level of Noise Mitigation Required – **HIGH**

Sites 16/17: Andrews Street Site – North / South



- Leq : **62-65 dBA**
- Lmax – **81 dBA** Chiller near grade at Adjacent property
- Area of site with highest ambient noise – North
- Area of site with lowest ambient noise – Area near St Joseph Park

Notes: Traffic on Loop Road and local traffic on Clinton St and Andrews St was the controlling factor in ambient sound levels. Sound levels fairly consistent across both sites. A chiller near ground level on an adjacent property across Pleasant St was clearly audible and controlled the ambient sound levels along the south of the site.

Relative Level of Noise Mitigation Required – **HIGH**