



Appendix IV: Recreation Demand Oregon Ridge Park Master Plan

June 2023

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Table of Contents

Introduction	3
Inventory, Historical Attendance and Facility/Site Observation	4
Park Visitation Data.....	4
Picnic Pavilions Usage.....	5
Lodge Conference Center Usage.....	10
Whole Park Rentals and Special Events.....	12
Softball Fields.....	13
General Recreation Field Areas (AREA C).....	14
Nature Center.....	15
Dinner Theater.....	17
Historical Attendance Estimates.....	18
Inventory, Historical Attendance and Facility/Site Conclusions.....	18
Recreation Opportunity Assessment	19
Current Recreation Activity Assessment.....	19
National Recreation Participation.....	19
Local/Regional Recreation Participation.....	22
Current Recreation Opportunities Conclusions.....	34
Future Recreation Activity Assessment.....	34
ESRI BAO Market Potential.....	34
Future Recreation Opportunity Conclusions.....	37
Comparable Market Analysis	38
Rental Facilities.....	38
Picnic Shelters.....	41
Nature Center.....	43
Athletic Fields and Ball Diamonds.....	45
Playgrounds.....	45
Dog Parks.....	45
Comparable market Analysis Conclusions.....	45

Recreation Program Assessment Recommendations	46
Cost Benefit Analysis	48
Market Research.....	48
Historical and Estimated Future Demand Forecasts.....	48
Estimated Financial Forecasts.....	49
Cost Benefit Analysis.....	56
Conclusion.....	56
Assumptions and Limiting Conditions.....	58

Tables

Table 1. Oregon Ridge Park Picnic Pavilion and Tent Inventory.....	5
Table 2. Oregon Ridge Park Lodge Room Inventory FY22.....	10
Table 3. FY2019 ORP Park Usage.....	18
Table 4. National Recreation Participation Trends.....	20
Table 5. General Outdoor Activities Highest Natural Recreation Participation.....	22
Rates and One- and Five-year Growth Rates	
Table 6. ORP Local/Regional Recreation Trend Surveys.....	30
Table 7. ORP Local/Regional Recreation Trend Surveys.....	31
Table 8. Baltimore County LPPRP 2021: Top 10 Amenities.....	32
Table 9. Baltimore County LPPRP 2021: Preferred Capital Investment.....	33
Table 10. ESRI BAO Sports and Leisure Potential.....	36
Table 11. Comparative Data Sources for Future Recreational Activities.....	37
Table 12. Comparative Data Sources Rental Facilities.....	39
Table 13. Comparative Data Sources Rental Facilities.....	40
Table 14. Comparative Data Sources Picnic Pavilions.....	41
Table 15. ORP Comparative Data Sources Nature Centers.....	43
Table 16. ORP Estimated Demand Forecasts for Lodge and Nature Complex.....	49
Table 17. ORP Estimated Rates for Lodge and Nature Complex.....	51
Table 18. ORP Estimated Rates for Lodge and Nature Center.....	52
Table 19. ORP Lodge Complex.....	54
Table 20. ORP Nature Center Forecast.....	55
Table 21. Cost Benefit Analysis.....	57



RECREATION DEMAND

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Visiting the chickens at the ORP Nature Center

June 2023

INTRODUCTION

Understanding who is and who is not using Oregon Ridge Park (ORP) is fundamental to the development of appropriate master plan recommendations. Do the activities available in the park today match with visitor desire? Are there local, regional, or national trends in recreation (for example pickleball, or the increased desire for walking/ hiking) that indicates other activities should be considered in the development of the Oregon Ridge Park Master Plan (ORPMP)? This document contains the findings for an inventory of existing conditions and a recreation opportunities assessment for visitor use patterns and needs. This report was completed in 2022. A cost benefit report on the proposed rebuilt and new facilities - the Nature Center and the Lodge replacement was completed in the fall of 2023.

Baltimore County provided data related to the visitor use of the facilities at ORP, from pavilion permits to Oregon Ridge Nature Council membership zip codes. Additionally, CHM Government Services (CHMGS) undertook interviews with park staff responsible for activities as well as groups licensed and permitted to conduct activities at the park. These interviews provide an understanding of data collected as well as provide perspectives on current and future needs of visitors to the park. CHMGS also undertook secondary market research to understand national and regional recreation trends as well as the comparable market supply for these activities. The findings of this analysis are used in the development of the recommendations for the ORPMP.

INVENTORY, HISTORICAL ATTENDANCE, AND FACILITY/ SITE OBSERVATIONS

PARK VISITATION DATA

Baltimore County Recreation and Park collects usage data from multiple sources within its park's system using different data systems. The standard software used for collecting activities data is Baltimore County's Recreation and Parks Statistics System (RPSS) and this data was used to generate information on Nature Center programming usage. However, this software is not designed to book and track special events and reservations for the Lodge nor the Nature Center or the Lodge picnic pavilions/ tents and picnic areas. This reservation-based data for room and pavilion rental in the Lodge area was tabulated using scanned copies of paper permits and licenses issued by the Lodge. Data on the usage of the Nature Center pavilions was tabulated by the Nature Center manager and provided in a MS Excel file format.

Data was provided from FY 19 (i.e., July 1, 2018, to June 30, 2019) as this was the most recent normal full year of operation in the last four-year period. FY 20 and FY 21 are considered to be Pandemic years, with use atypical use patterns and FY 22 was not complete as of the date of the analysis.

In addition to this quantified use, the park attracts general visitation, including playground use, and individuals using the park for recreational fitness (e.g., trails and non-reservable day use). Baltimore County does not have traffic counters installed at the park and therefore, overall visitation to the park is not available.

Picnic Pavilions Usage

ORP has eight picnic pavilions/ tents that are managed separately by the Nature Center (3 pavilions) and the Lodge (3 pavilions and 2 seasonal tents). An inventory of picnic pavilions/ tents and their ownership, capacity, size, fees and amenities is provided in Table 1.

As shown in the graph on the following page, early spring and summer are the most popular rental periods for the Nature Center pavilions. Calculation of occupancy indicates that the Kidd’s Pavilion is the most requested and used, with occupancy of approximately 34 percent, followed by the Lake Pavilion at 20 percent and the Woodland Pavilion at 11 percent. Total visitor usage of the Nature Center pavilions in FY 19 is approximately 1,700 based upon pavilion rental attendance figures. Note that

these figures are higher than reported in RPPS for the same period but were tabulated directly from data provided by the Nature Center. Information was not provided on the type (e.g., profit or non profit, member or non-member) of users of the Nature Center Picnic pavilions.

Picnic Shelters	Size	Pricing		Amenities
		Weekday	Weekend	
Lodge Pavilions		Private Rates (Discounts for Non Profits and Rec Councils 15-22%)		
Arts Pavilion	200	\$350/ 5hr	\$400/ 5hr	Grills/ Tables/ Outlets
Ridge Pavilion	200	\$350/ 5hr	\$400/ 5hr	Grills/ Tables/ Outlets
Westinghouse Pavilion	100	\$200/ 5hr	\$250/ 5hr	Grills/ Tables/ Outlets
Timber Tent		\$175/ 5hr	\$175/ 5hr	Grills/ Tables
Pecos Tent	25	\$175/ 5hr	\$175/ 5hr	Grills/ Tables
Nature Center		Private Rates (Discounts for Nature Center Members 20%)		
Kidd’s Nature Pavilion	75	\$250/ 4hr	\$250/ 4hr	Grill/ Tables/ Outlets
Lake Pavilion	75	\$250/ 4hr	\$250/ 4hr	Grill/ Tables/ Outlets
Woodland Pavilion	30	\$100/ 4hr	\$100/ 4hr	Tables Only

Source: Oregon Ridge Park Nature Center and Lodge

Nature Center Picnic Pavilions

The Nature Center picnic pavilions are managed and maintained by the Nature Center. These pavilions typically are available for rent from April 15 to November 15th. The effective occupancy rate for the Nature Center pavilion was determined by counting total available rental days including weekend days only during the months the shelters are open (i.e., 32 weekends times 2 days per weekend = 64 days).

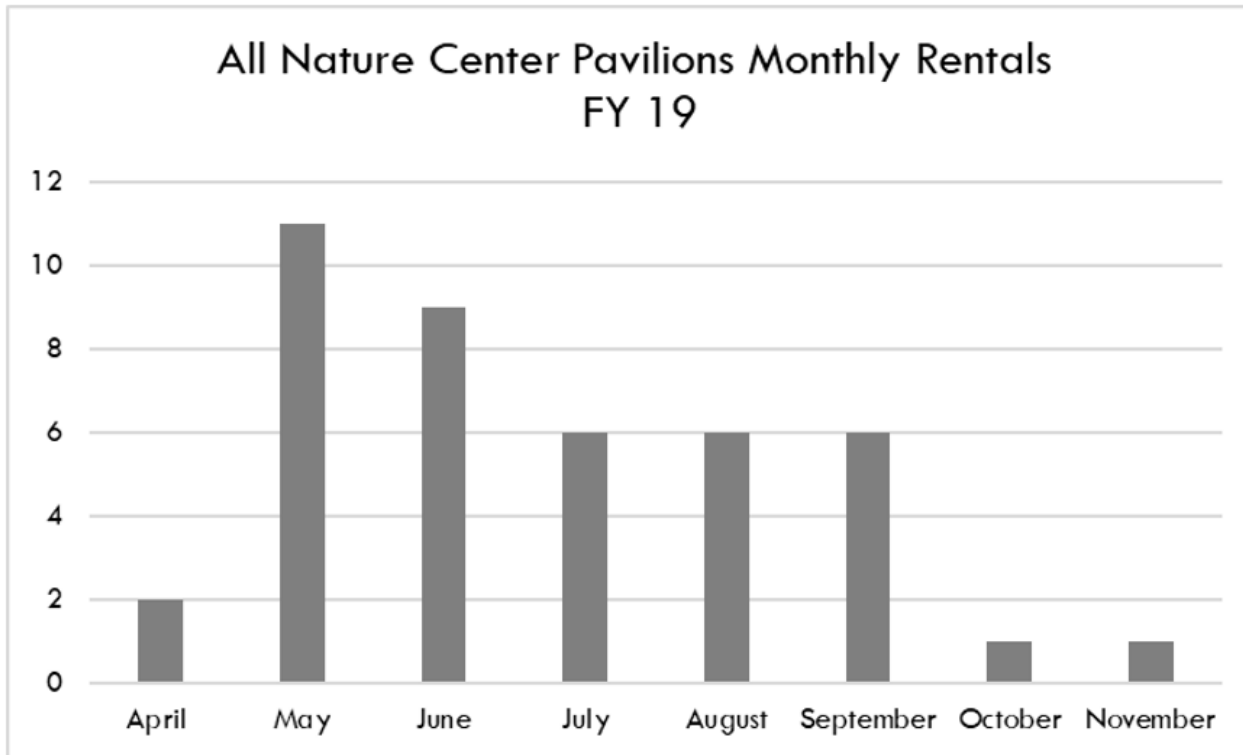
and resultantly the Nature Center. The ORNC in turn financially supports some programming and facility enhancements at the Nature Center.

Needs Assessment

Interviews with the Nature Center manager indicated that the Nature Center picnic pavilions are an important amenity for Nature Center members, a beneficial revenue source for Oregon Ridge Nature Center Council (ORNC) (i.e., non profit for Nature Center),

Nature Center staff provided feedback on elements that would improve operations and visitor services for the Nature Center’s picnic pavilions:

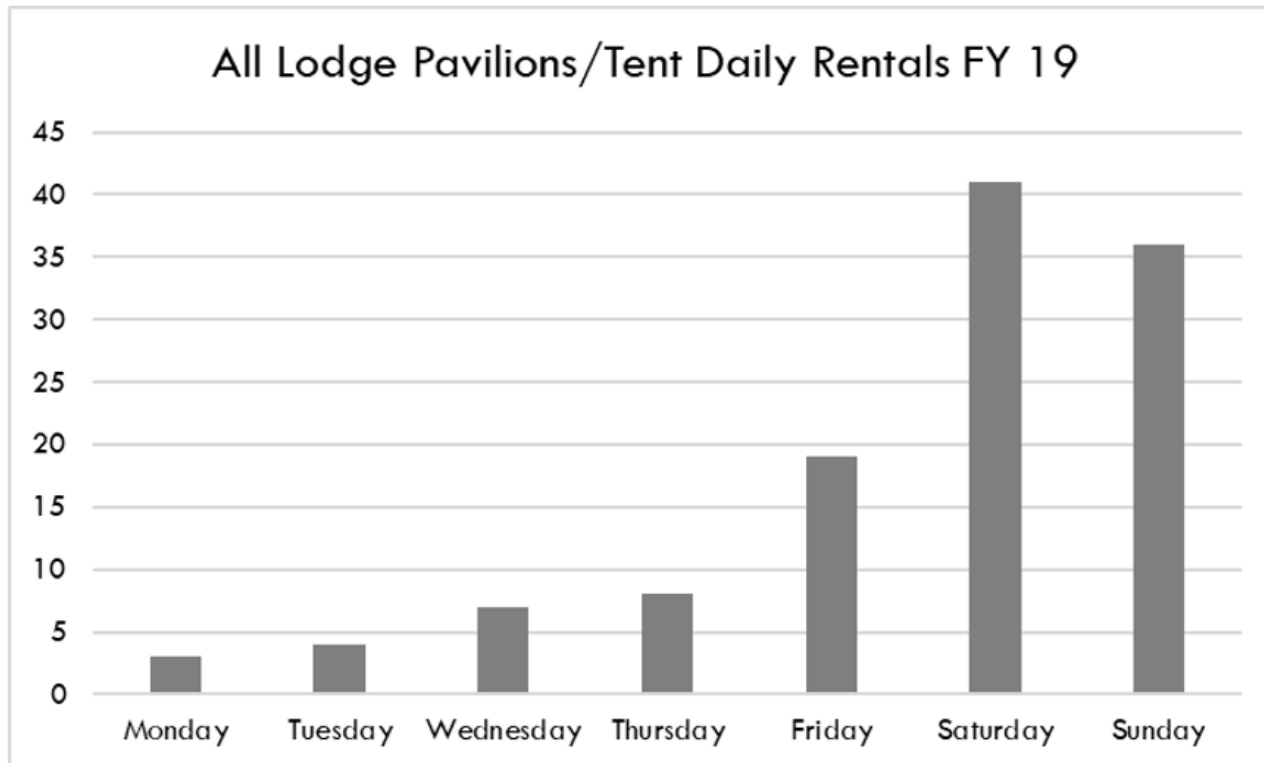
- Limited parking is the primary issue at the Lake and Woodland Picnic Pavilions. Currently, there is not adequate parking to support rental of both the Lake Pavilion and the Woodland Pavilion at the same time



Graph of monthly rentals of the ORP Nature Center, with May being the highest demand month

Lodge Picnic Pavilions/ Tents

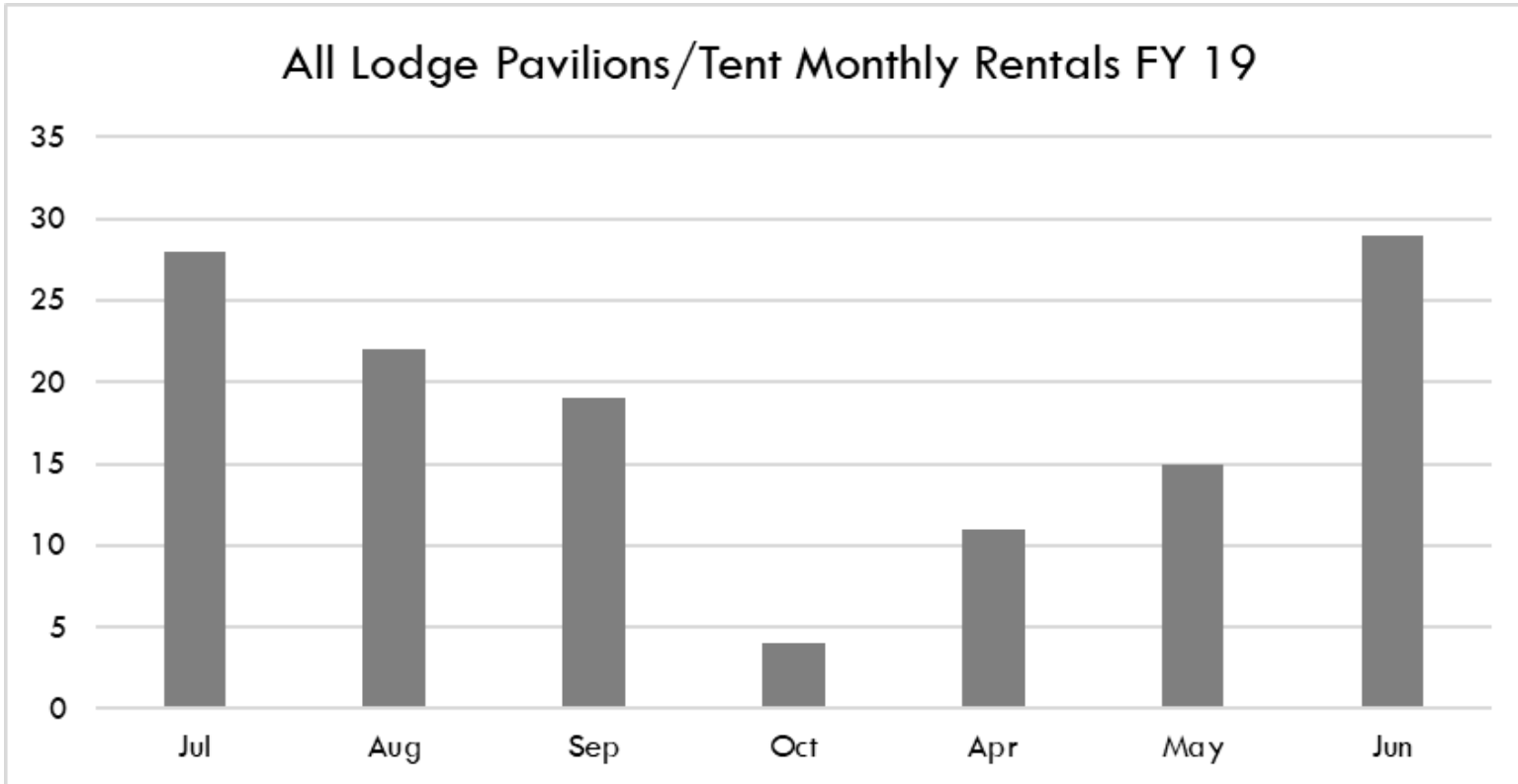
The Lodge manages the five rental picnic pavilions/ tents on the east side of the park. These are typically available for rent from May 1 to October 31. Effective occupancy was calculated for the picnic shelters/ tent by considering the available number of per week as the full seven. This number of week days, combined with the seasonal availability from May 1 to October 31, equals approximately 190 potential rental days. A determination was made to include weekdays after evaluating the usage of pavilions/ tents during the week. The graph below identifies that Saturday and Sunday are the highest usage days with Friday following closely.



Graph of daily rentals of tents and pavilions at the ORP Lodge, with Saturday being the highest demand

The graph below documents that early spring and summer are the most popular rental periods for the Lodge pavilions. Occupancy data indicates that the Art and Science Pavilion receives the highest usage at approximately 30% occupancy. This is followed by the Ridge Pavilion at 20 percent and then the Westinghouse (7%), Timber Tent (5%) and Pecos Tent (1%). Total visitor usage of the Lodge picnic pavilions/ tents in FY 18/19 is approximately 12,000, based upon pavilion rental attendance figures.

A review of the user profile of the Lodge picnic/pavilion tent users, indicates that seventy (70%) percent of the users were for entities that were NOT non profits [definition used for non profit: if you are not a formal, legally recognized non profit organization, you are considered to be a for profit organization, whether the entity is a corporate business or an individual planning a wedding¹] and the balance, thirty (30%) percent were non profits. A review the zip codes of entities issued permits was completed to identify the market drawing area for Lodge picnic pavilion/tent rentals. The data identifies that most permit holders for rentals are from within Baltimore County and almost equally split between a 15- and a 30-minute drive time of ORP.



Graph of monthly rentals of pavilions near the Lodge at ORP, with June and July being the busiest months

1 Annie Sanchez phone conversation, June 16, 2022

Needs Assessment

Interviews with the Lodge Manager and staff indicated that the picnic pavilions/tents are an important amenity for ORP. Staff provided feedback on elements that would improve operations and visitor services for the picnic pavilions at ORP.

- The **listed capacities of the two large picnic pavilions should be reduced to 150 from 200** to provide enough covered area for pavilion use on rainy days, as there is no rain cancellation policy, the rental is presented as rain or shine
- Improved and additional parking near the picnic pavilions is needed, as parking is currently limited and the adjacent parking serves general park users, playground users, Lodge users, and the picnic pavilions
- The traffic pattern in the pavilion area of the park and the proximity of the large playground presents risks to users
- Improved, permanent, ADA accessible, and updated restrooms supporting the picnic pavilions are needed; visitors may use the Lodge indoor restrooms when it is open to the public and visitors prefer the indoor facilities due to the poor condition of the three free-standing restrooms; the free-standing restrooms are often closed and not open for use, temporary toilets are provided instead with one permanent temporary toilet located adjacent to the large playground
- Expanding the Westinghouse Pavilion's capacity and providing a paved, ADA accessible path would likely increase its use
- Adding potable water hook-ups at each of the picnic pavilions/ tents would reduce the time and effort needed to clean and maintain each pavilion between rentals; available potable water at each pavilion would also provide a welcome service to renters

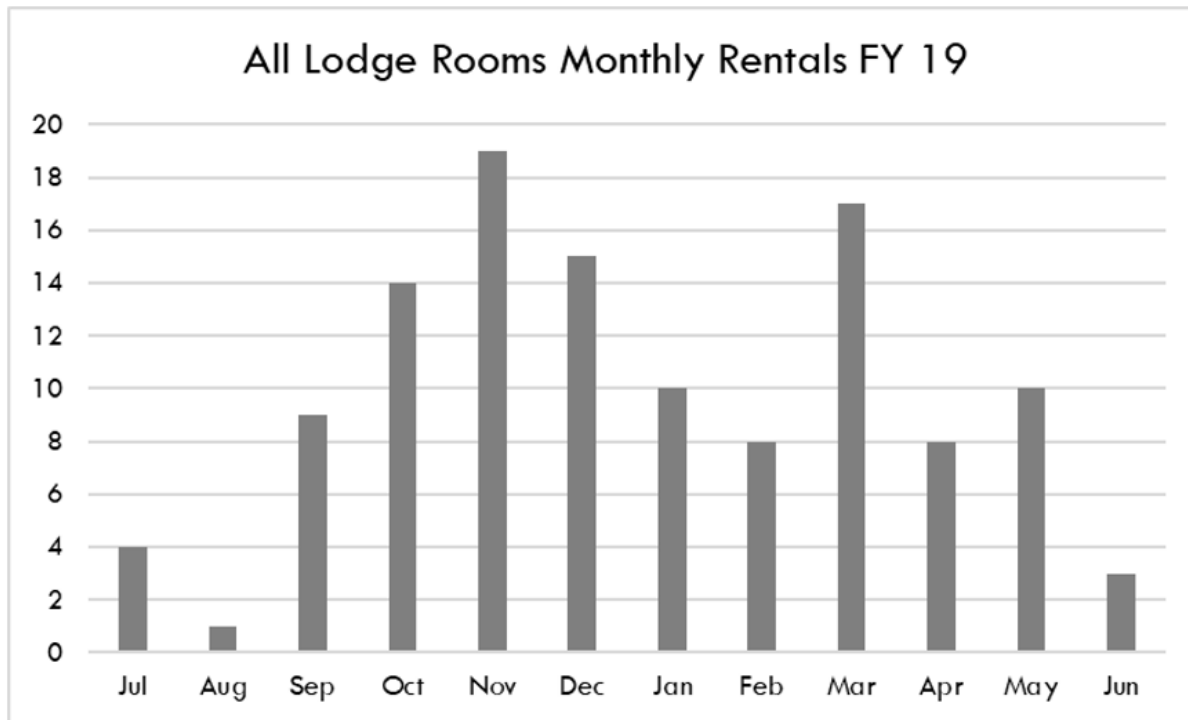
Lodge Conference Center Usage

The Lodge provides meeting and gathering space for the public. The facility has three meeting rooms of differing sizes and is adjacent to the Hubert I. Snyder Concert Shell. An review of the Lodge rental spaces, their capacity, size, fees, and amenities are provided in the Table 2 below.

Table 2. Oregon Ridge Park Lodge Room Inventory FY22				
Lodge Rooms	Size	Pricing (Private Rates)		Amenities
		Weekday (M-Th)	Weekend (F-Sun)	
		Discounts from Private Rates are (30 to 40%) for Non Profits and Rec Councils		
Oregon Ridge				
Sequoia Room (1)	120 Bqt, 150 Mtg.	\$400/ 4hr	\$750/ 4hr	Tables and chairs, small stage, basic audio visual and screen, catering kitchen
Seneca Room	30 Mtg.	\$200/ 4hr	\$300/ 4hr	Tables and chairs
Shawan Room	N/A	\$50/ 4hr	\$100/ 4hr	Tables and chairs
Pecos Tent	25	\$175/ 5hr	\$175/ 5hr	Grills/ Tables
Hubert I. Snyder Concert Shell	N/A	\$150/ hr (2 HR min)	\$150/ hr (2 HR min)	Chairs
Whole park rental (Lodge side), including Lodge and Concert Shell	N/A	\$1000/ day	\$1,500/ F, SN/ \$2,000 Sat /per day	Support services
<i>Note (1): Sequoia Room capacity varies depending upon type of function and requested set up</i>				
<i>Source: Oregon Ridge Park Lodge</i>				

The Lodge facility is available for rental year-round; however, due to the absence of air conditioning, its rental use is less frequent during the summer months. Additionally, based upon staffing limitations, the Lodge does not rent lodge rooms more than once per day. Recognizing these limitations, Lodge rooms are available for rental approximately 182 days per year. The graph on the following page identifies that late fall/winter and spring are the most popular rental periods for the Lodge. Facility Occupancy data indicates that the Sequoia Room receives the highest usage at approximately 53% occupancy. This is followed by whole Lodge rental at eight (8%) percent. The Seneca and Shawan Rooms have rental rates below five (5%) percent. Total visitor usage of the Lodge in FY 18/19 is approximately 14,000 based upon Lodge rental reservation attendance figures. A review of the user profile of the Lodge users indicates that ten (10%) percent of the users were NOT non profits organizations [definition used for non profit: if you are not a

formal, legally recognized non profit organization, you are considered to be a for profit organization, whether the entity is a corporate business or an individual planning a wedding] and ninety (90%) percent were non profits. A review of the zip codes of entities securing the permits to identify the market drawing area for Lodge facility rentals. The data identifies that most rentals are from within Baltimore County, with most rentals coming from the 15-minute drive time of ORP.



Graph of monthly rentals of rooms within the Lodge at ORP, with November and March being the busiest months

Needs Assessment

Interviews with the Lodge Manager and staff indicated that the Lodge provides an important community gathering space for special events, serves as a headquarters for large park events, and provides value to Baltimore County for its internal meetings and events. Staff provided feedback on elements that would improve operations and visitor services for the Lodge facilities at ORP.

- The Lodge is not air conditioned and as a result, is less desired for rentals during the summer months
- The Lodge does not have a fire alarm nor fire suppression system; as a result, room configurations are designed to provide for fire egress (clear aisles) which reduces total seating capacity than can be accommodated in rooms of the same size with appropriate fire suppression
- Built-in audiovisual capacity is limited, a feature which is increasingly desired/ demanded by renters
- WIFI service is limited

- The facility's furniture, fixtures, and equipment have not been updated in over 20 years; as a result, while the cost of the facility is affordable, the out-of-date furnishings deters some potential renters
- The catering kitchen lacks updated freezer and refrigeration units, making the facility less attractive to outside caterers
- The doors between the lobby and the Sequoia Room cannot be closed during private functions taking place in the Sequoia Room, reducing privacy for renters and creating additional sound for users in other portions of the Lodge
- The Lodge has several storage rooms spread throughout the facility, a lack of centralized storage makes accessing supplies and equipment more time consuming for staff
- The Concert Shell flooring is plywood which is not a resilient and/ or sturdy surface (replaced late summer 2022) and limits users due to weight constraints (for example, the stage cannot support choir risers for use in high school choral concerts or needed light rigging for special events); the original flooring for the stage was selected to enhance the acoustics for the Baltimore Symphony Orchestra (BSO) which was a six to seven summer event tenant at the time; since that time, the BSO has reduced its use of the facility to one time per summer season and mics its orchestra for all outdoor concerts, negating the need for the wooden flooring

Whole Park Rentals and Special Events

The Lodge and its surrounding grounds, hillsides, and vast view create a unique event location. The park is a desired large special event location. When such an event occurs, the entire Lodge side of the park (entry drive, playground, five picnic pavilions, and lawn area in addition to the Lodge and Concert Shell) is closed to the general public. In FY 18/19 there were five special events scheduled that required closing the entire Lodge side (eastern) of the park. The Nature Center and Quarry Lake area with access from Kurtz Lane remains open to the general public. Several of these events are recurring. Data regarding event size was estimated from interviews where provided. Events are listed below along with the month they occur and estimated attendance:

- Baltimore Symphony Orchestra 4th of July: JULY 3 (est. 5-7500 initially with shuttle service for off-site parking; since shuttle service was discontinued attendance is more in the 4,000 range)
- Hot August Music Festival: AUGUST (est. 4 – 5000, uses a shuttle system for off-site parking)
- Kennedy Krieger ROAR Fund Raiser: APRIL (est. 600-1000)
- Karma Fest: MAY (N/A; no longer using the park)
- Great Grapes: JUNE (N/A; no longer using the park)
- Rosh Hashanah Under the Stars (September; not able to schedule interview)

Needs Assessment

Interviews with the Lodge Manager and representatives of three of these event hosts identified that the large open area, parking capacity, and concert shell serve the needs of large, unique, outdoor music and group gatherings. Staff and users provided feedback on elements that would improve operations and visitor services for whole park rental and special event users at ORP:

- The park has poor quality permanent freestanding restrooms; most visitors choose to use the restrooms inside the Lodge when available (often limited to staff and performers only during large events) vs. the free-standing restrooms

- The park does not have adequate amounts of water to facilitate visitors using the restrooms as well as hand washing during large events (anecdotal, not documented, requires further research, it may be a septic issue and not a water issue)
- Parking capacity limitations impact the ability to accommodate larger events, minimal paved parking and overflow parking spaces on site; shuttle systems not always effective, a long walk to the nearest Light Rail Station without a sidewalk or formal trail
- The Concert Shell, while functional, will benefit from updates in stage flooring stability (plywood replaced late summer 2022, but that did not address weight limitations)
- The park's layout, with large grassy lawn areas and minimal paved ADA accessible paths presents accessibility issues for visitors
- All parties interviewed referenced the poor quality of the three free-standing permanent restrooms near the picnic pavilions

Softball Fields

ORP provides permits for two general use softball fields. The Lodge permits these fields, and the Cockeysville and Lutherville Timonium Recreation Councils are the permitted entity. The fields have been used by both Adult and Youth Softball leagues, primarily as practice fields since they are not regulation specific for either Adults or Youth. The primary field use period is in the spring and fall with Field #1 (western field) typically used by Youth teams and Field #2 (eastern field) being shared between Youth and Adults. Data from the permittee (e.g., Program Organizer) indicates that the Youth Softball program registrations have grown from 499 in Calendar Year (CY) 19 to a current high of 526 as of CY22. Youth program registration data was provided and it indicates that in CY19, 86 schools were being supported using the softball fields at ORP. Interviews also indicated that soccer, flag football, and frisbee team sports have used the site in the past, but presently are not requesting new permits. A review of zip code registrations provided by the program organizer for softball use indicates that the program participants come from the North Central region of Baltimore County.

Needs Assessment

Interviews with the program organizer for Youth and Adult Softball identified that the field space available for softball at ORP serves a valuable need for both youth and adult sports leagues. Specifically, youth softball would be significantly impacted if the fields at ORP were no longer available. The program organizer provided feedback on elements that would improve operations and visitor services for fields at ORP:

- Formalize the two softball fields to meet standard dimensions and orientations to allow for two field use simultaneously; it was indicated that Field #1 could be reoriented by approximately 15 degrees northwest
- Consider adding a rectangular general use field, based on the historic use by other square field users (e.g., soccer, flag football and frisbee)
- Evaluate and address drainage and slope of fields (conflicting reports of drainage issues)
- Provide or support provision of field boxes and support amenities for softball (e.g., bases)
- Improve and expand existing parking area

General Recreation Field Areas (AREA C)

Interviews were conducted with both Baltimore Youth Cycling (BYC) and North Baltimore County Composite Cycling Team (NBCC), each who use Area C (noted as such for overflow parking purposes, this is the field directly north of the Lodge and Dinner Theater across the entry drive to the Lodge) for practice sessions. BYC represents youth between the ages of 8 to 18 and focuses on both cyclocross and road disciplines. BYC supports a junior racing team that competes throughout Maryland in cyclocross, time trials, criterium, road, and stage races. NBCC is a cross country mountain bike team for students in grades 6 to 11 and rides within the Maryland Interscholastic Cycling League. NBCC represents youth who are participating in the MIAA Mountain Bike League.

Data received from representatives of BYC indicate that the program currently supports 77 youth in practice sessions at ORP twice a week in the fall. The program has approximately 40 youth on their waiting list and is of the opinion that the program could double in size if they had the availability of practice space. Interviews with NBCC indicate that the number of teams has grown from 19 in CY19 to 21 in CY21 and the number of riders has grown from 426 in CY19 to 690 in CY21. Specific zip code data on members of each organization were not available; however, interviews indicate that most members come from communities along the Interstate 83 corridor.

Needs Assessment

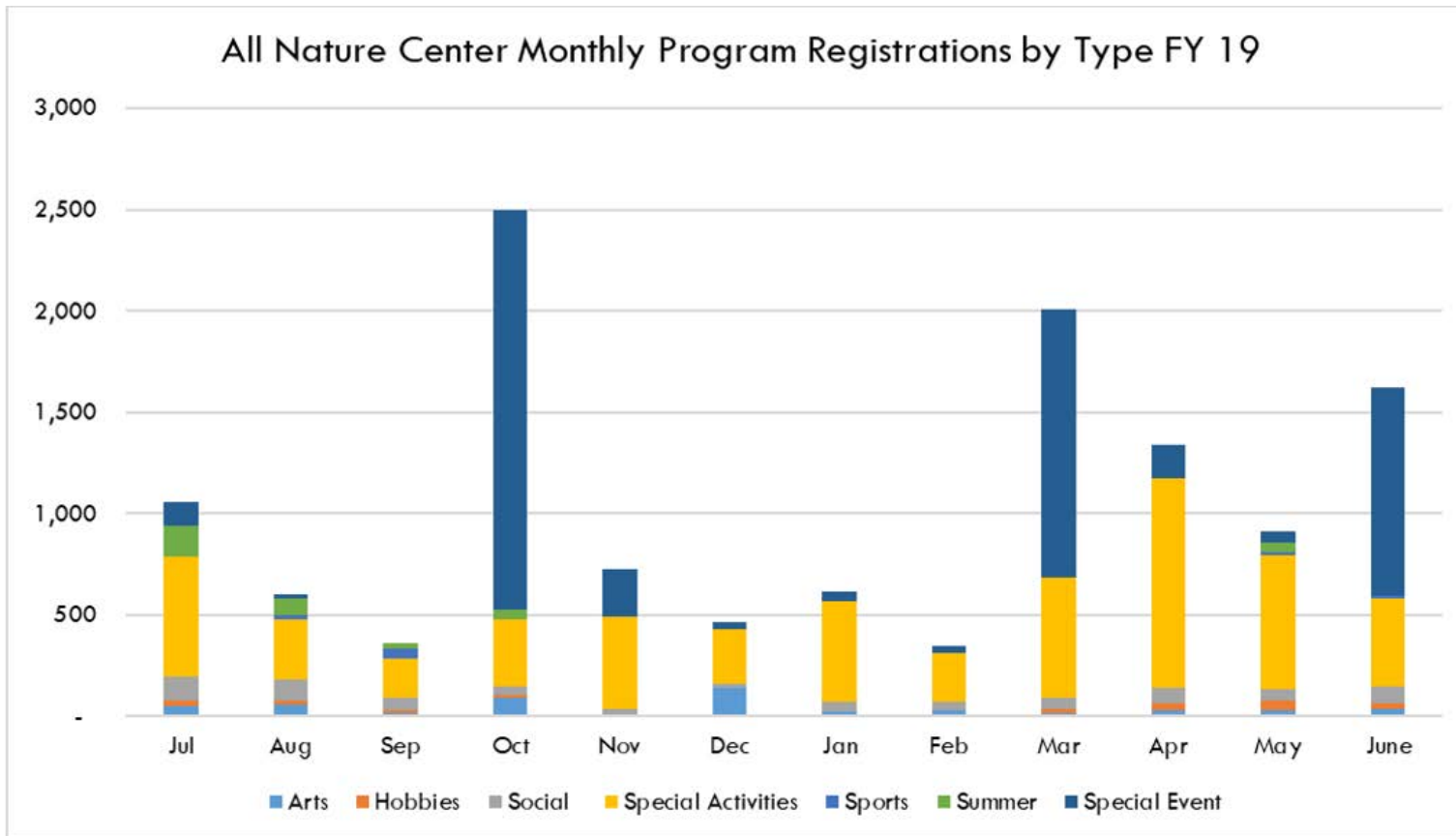
Interviews with the regional representatives of both youth cycling programs identified that the existing ORP Area C is a critical element to their organizations' ability being able to provide youth outdoor cycling training. Specifically, the setting resembles relevant course conditions. Specifically, both programs indicated that their programs growth and sustainment would be impacted significantly if Area C access was not available. These two user groups provided feedback on elements that would improve operations and visitor services for fields and terrain at ORP. Comments received:

- Access to large, protected parking area adjacent to training area is very attractive and is needed for setting up course elements for training and practice
- The size and nature of the grass area in Area C is highly suitable for practicing bicycle handling
- The adjacency of Area C to the hill and other terrain elements is highly suitable for both programs
- Both groups indicated a desire for a trail system that would support mountain biking and/or elements of cyclocross; the addition of a professionally designed and built stacked loop up to three-mile multi-use trail system would significantly enhance the program and its offerings and hence attract more participants
- There are significantly more bicycling groups that would be attracted to ORP if additional access to Area C was provided as well as multi-use trails
- Limited hours of Lodge availability make access to the indoor restrooms difficult; outdoor free-standing restrooms are not often open; the area is served by a permanent porta-potty near the playground

Nature Center

The ORNC provides a wide variety of programs and activities for youth, families, and adults. These programs include those requiring formal registration as well as drop-in programs. The Nature Center manager provided data on the Nature Center maintained on the RPSS system. Data included registrations as well as attendance. These data sources were analyzed and registration data for formal programs and attendance data for nonscheduled activities was extracted.

Fall is the most highly programmed season, followed by the spring and early summer. Nature Center use is greatest in the summer followed by the spring. The largest program registrations come for special events and special activities. For non-programmed activities, 'Park Attendance-Unscheduled' were excluded numbers as it appears that this is a plug number and is not based upon observable demand. As such, the largest two attendance figures are Nature Center programs at eighteen (18%) percent and non-registered events at (69%) percent. Non-registered events include meetings using the Nature Center, drop-in Nature Center



Graph of annual program monthly registration activities at the Nature Center; Source: RPSS Report

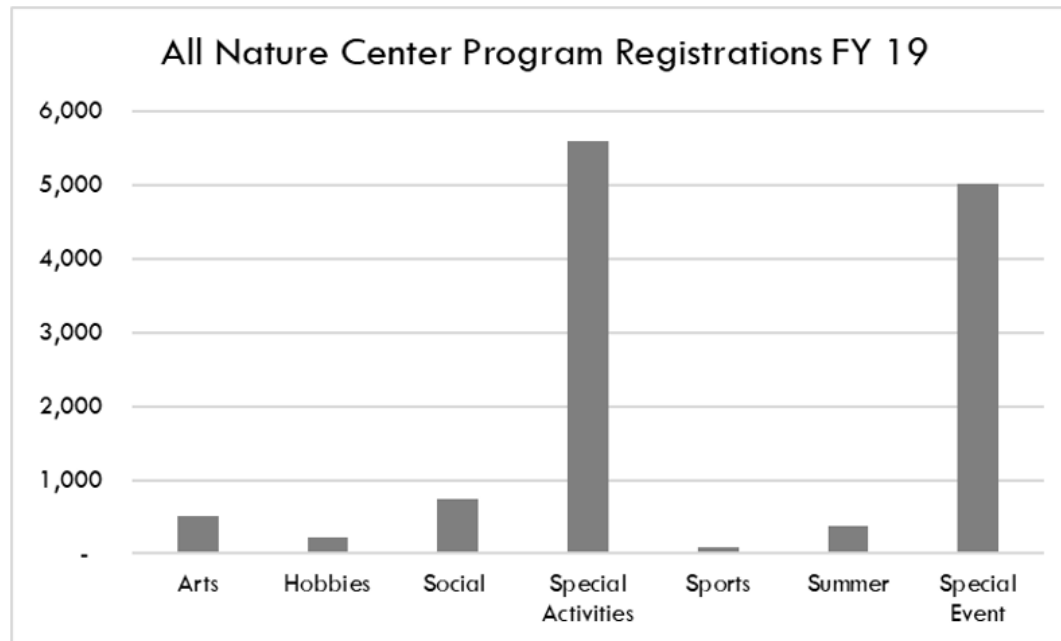
attendance, and pavilion permitted use, separately documented under picnic pavilion rental elsewhere in this report. The Nature Center membership data base was queried regarding the zip codes of members. The majority of Nature Center membership is from individuals within Baltimore County, but members do exist in surrounding counties. Approximately one third of members are outside the 15-minute drive time to the park.

Needs Assessment

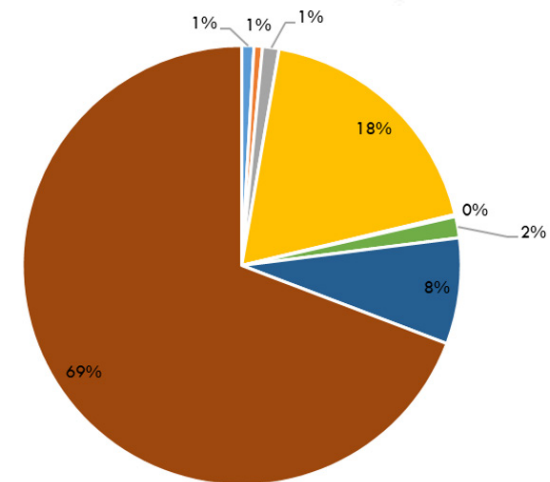
Interviews with the ORNC manager identified how the setting supports programs and activities for young children, youth, families, and adults in and around Baltimore County. The Nature Center manager provided feedback on elements that would improve operations and visitor services for nature centric activities at ORP.

- The Nature Center’s utilities need replacement or significant repair; air conditioning and heating systems do not function appropriately and provide varying heat and cooling throughout the building
- Major system components (e.g., roofing, utilities, doors/access, floors) all appear to need repair; roofing, after multiple repairs, continues to leak; floors do not provide drainage in proper locations; and doors have rot which allows for infestation

- Art Events
- Hobby Events
- Social Events
- Nature Programs
- Sports
- Summer Camps
- Special Events
- Non Registered Events (2)



Graph of all registration activities at the Nature Center in FY 19; Source: RPSS Report



Graph displaying non-program attendance at the Nature Center FY 19; Source: RPSS Report

- Lacks storage of the right type, in the proper location - example: animal care supplies and equipment located in various spaces which makes caring for animals a time-consuming effort and physically taxing; storage for tables and chairs in the auditorium is not adequate
- Number of programs the Nature Center can provide is limited by the lack of additional classroom space
- Outdoor Aviary is not easily accessible for staff and currently does not have a water supply; all materials need to be carried through the Nature Center to support the Aviary
- The Nature Center's small kitchenette is inadequate for programming, there are classes where cooking is a component and what is provided is not appropriate; presence of rodents makes food service problematic

Dinner Theatre

There is no existing attendance data for the ORP Dinner Theater as this facility has not been used in the last four years. A site visit made visible that portions of the building are currently being used for storage. As such, no additional analysis was done regarding the potential reuse as a theatre facility.

HISTORICAL ATTENDANCE ESTIMATES

Available data provided by entities supporting program and activities at ORP was collected, synthesized, and analyzed. ORP staff were asked to compile data from their relevant sources. The Lodge summary data came from a variety of sources. It has not been validated against the permit and license data received. The Nature Center data came from the RPSS system. **A key finding from this data collection effort is that ORP’s data systems are disparate, not digital, nor standardized. Due to these issues, it is difficult to provide longitudinal data to inform management decisions.**

INVENTORY, HISTORICAL ATTENDANCE, AND FACILITY / SITE CONCLUSIONS

ORP consists of facilities and amenities that continue to attract visitors for a diverse array of activities. Available data indicates that

Table 3. FY2019 ORP Park Usage		
Activity and Location	Attendance FY 19	Percent of Total
Lodge Side of Park		
Lodge Facility	16,608	11.4%
Lodge Picnic Pavilions	12,883	8.9%
Sports Fields	27,320	18.8%
Area C	4,445	3.1%
Whole Park Events	17,719	12.2%
Total (1)	78,975	54%
Nature Center Side of Park		
Art Events	588	0.4%
Hobby Events	415	0.3%
Social Events (e.g., After School, Mommy & Me)	804	0.6%
Nature Programs	12,259	8.4%
Sports	95	0.1%
Summer Camps	1,035	0.7%
Special Events (e.g., Parties, holiday events, NC Events)	5,157	3.6%
Non-Registered Events (2)	45,759	31.5%
Total	66,112	46%
FY 2019 Estimated Total Park Attendance	145,087	100%

usage is almost evenly split between activities occurring on the Nature Center and the Lodge side. Data is not available on the use of ‘individual’ activities such as walking, jogging, and playground use; however, these uses were identified as activities where there is daily evidence of participation. Interviews with staff and users identify that high quality visitor service is impacted by the age and condition of both the Lodge and the Nature Center. Despite these issues, there remain high levels of demand for these facilities.

Note (1) Does not include Playground attendees and (2) This includes, meetings, drop in visits to the Nature Center and Outside Groups using the Nature Center. It does not include standard estimate of non associated attendance.

RECREATION OPPORTUNITY ASSESSMENT

CURRENT RECREATION ACTIVITY ASSESSMENT

Assessing the quality and appropriateness of existing recreational opportunities includes evaluating the position of the facilities and activities existing within ORP, considering local/regional trends, and positioning the local/ regional trends within a national framework. To understand this, data from multiple sources listed below:

- **National:** Sports Fitness Industry Association (SFIA) Topline Participation Report, 2022
- **Local/Regional:** 2019-2023 Maryland Land Preservation and Recreation Plan, Baltimore County Land Preservation, Park and Recreation Plan (LPPRP), 2022 and ESRI Market Drawing Area data

These sources are presented separately and then aggregated where relevant to address the current and potential recreational uses for the ORP.

National Recreation Participation

Evaluating national recreation participation data provides perspectives on the scope and scale of recreation participation, including longitudinal trends in the long and short term. National recreational trend data should be evaluated as a ‘frame for understanding recreational use patterns. Local/ regional demand and preferences should be relied on more heavily when evaluating existing and future recreational activities for the ORPMP.

As stated above, the most relevant source for evaluating national recreation participation is the Sports Fitness Industry Association Topline Participation Report issued at the beginning of 2022. The data is typically aggregated by categories of activities (e.g., General, Team, Racquet and Group Conditioning which can occur Outdoors).

Table 4 on the following pages outlines five years of trend data and is color coded within each category of activities. The color coding in these tables represented by Green, Yellow, Orange, and Red reflects the highest level of participation or growth (e.g., Green) and lowest level of participation and/or growth (e.g., Red).

Table 4. National Recreation Participation Trends

Category of Activity	Thousands (000)				Compound Annual Growth Rate (CAGR)		
	2016	2019	2020	2021	Three Year Trends 2016-2019	Five Year Trends 2016-2021	One Year Trends 2020-2021
General Outdoor Activities							
Adventure Racing	2,999	2,143	1,966	1,826	-10.0%	-9.4%	-7.1%
Archery	7,903	7,449	7,249	7,342	-2.1%	-1.5%	1.3%
Backpack Overnight (> 1.5 mile from vehicle/home)	10,151	10,660	10,746	10,306	1.4%	0.3%	-4.1%
Bicycling (Road)	38,365	39,388	44,417	42,775	3.7%	2.2%	-3.7%
Bicycling (Mountain Bike)	8,615	8,622	8,998	8,693	1.1%	0.2%	-3.4%
Bicycling (BMX)	3,104	3,648	3,880	3,861	5.7%	4.5%	-0.5%
Birdwatching (> 1/4 mile of vehicle/home)	11,589	12,817	15,228	14,815	7.1%	5.0%	-2.7%
Camping (<1/4 mile of vehicle/Home)	26,467	28,183	36,082	35,985	8.1%	6.3%	-0.3%
Camping (Recreational Vehicle)	15,855	15,426	17,825	16,371	3.0%	0.6%	-8.2%
Climbing (Sport/Boulder)	2,103	2,183	2,290	2,301	2.2%	1.8%	0.5%
Climbing (Traditional/Ice/Mountaineering)	2,571	2,400	2,456	2,456	-1.1%	-0.9%	0.0%
Golfing (on a 9 or 18 golf course)	23,815	24,271	24,804	25,111	1.0%	1.1%	1.2%
Golfing (off course only DR, EV or Sim)	8,173	9,905	12,057	12,362	10.2%	8.6%	2.5%
Hiking (Day)	42,128	49,697	57,808	58,697	8.2%	6.9%	1.5%
Horseback Riding	7,046	6,990	6,748	6,919	-1.1%	-0.4%	2.5%
Hunting (Bow)	4,427	4,628	4,656	4,577	1.3%	0.7%	-1.7%
Hunting (Handgun)	3,512	3,015	2,998	2,900	-3.9%	-3.8%	-3.3%
Hunting (Rifle)	10,797	11,084	11,098	10,762	0.7%	-0.1%	-3.0%
Hunting (Shotgun)	8,271	8,083	7,874	7,627	-1.2%	-1.6%	-3.1%
Roller-skating (In Line Wheels)	5,381	4,816	4,892	4,940	-2.4%	-1.7%	1.0%
Running/Jogging	47,384	50,052	50,620	48,977	1.7%	0.7%	-3.2%
Shooting (Sport Clay)	5,471	4,852	4,699	4,618	-3.7%	-3.3%	-1.7%
Shooting (Trap/Skeet)	4,600	4,057	3,837	3,750	-4.4%	-4.0%	-2.3%
Skateboarding	6,442	6,610	8,872	8,747	8.3%	6.3%	-1.4%
Target Shooting (Handgun)	16,199	14,579	14,253	13,952	-3.1%	-2.9%	-2.1%
Target Shooting (Rifle)	10,039	13,197	12,728	12,388	6.1%	4.3%	-2.7%
Trail Running	8,582	10,997	11,854	12,520	8.4%	7.8%	5.6%
Triathlon - Non Traditional Off Road	1,705	1,472	1,363	1,304	-5.4%	-5.2%	-4.3%
Triathlon- Traditional/Road	2,374	2,001	1,846	1,748	-6.1%	-5.9%	-5.3%
Walking for Fitness	107,895	111,439	114,044	115,814	1.4%	1.4%	1.6%
Wildlife Viewing (> 1/4 mile of vehicle/home)	20,746	20,040	21,038	20,452	0.4%	-0.3%	-2.8%

Table 4. National Recreation Participation Trends, continued

Team Sports On Fields					2016-2019	2016-2021	2020-2021
Baseball	14,760	15,804	15,731	15,587	1.6%	1.1%	-0.9%
Football (Flag)	6,173	6,783	7,001	6,889	3.2%	2.2%	-1.6%
Football (Tackle)	5,481	5,107	5,054	5,228	-2.0%	-0.9%	3.4%
Football (Touch)	5,686	5,171	4,846	4,884	-3.9%	-3.0%	0.8%
Lacrosse	2,090	2,115	1,884	1,892	-2.6%	-2.0%	0.4%
Paintball	3,707	2,881	2,781	2,562	-6.9%	-7.1%	-7.9%
Rugby	1,550	1,392	1,242	1,238	-5.4%	-4.4%	-0.3%
Soccer (Outdoor)	11,932	11,913	12,444	12,556	1.1%	1.0%	0.9%
Softball (Fast Pitch)	2,467	2,242	1,811	2,088	-7.4%	-3.3%	15.3%
Softball (Slow Pitch)	7,690	7,071	6,349	6,008	-4.7%	-4.8%	-5.4%
Ultimate Frisbee	3,673	2,290	2,325	2,190	-10.8%	-9.8%	-5.8%
Volleyball (Grass)	4,295	3,136	2,738	2,807	-10.6%	-8.2%	2.5%
Group Conditioning Exercises Which Can occur Outside	2016	2019	2020	2021	2016-2019	2016-2021	2020-2021
Boot Camp Style Training	6,583	6,830	4,969	5,169	-6.8%	-4.7%	4.0%
Cross Training Style Workouts	12,914	13,542	9,179	9,764	-8.2%	-5.4%	6.4%
Tai Chi	3,706	3,793	3,300	3,393	-2.9%	-1.7%	2.8%
Yoga	26,268	30,456	32,808	34,347	5.7%	5.5%	4.7%

Sports Fitness Industry Association Topline Participation Report, 2022

Table 5 provides the top recreation participation activities and those that have experienced the greatest Compound Annual Growth Rates (CAGR) growth over the last five years and most recent year. Recreational activities with the largest national participation are walking for fitness and hiking, followed by running/jogging, golfing and wildlife viewing. Table 5 identifies the ranking of these activities as well as those experiencing the greatest growth in participation over the last five years and the most recent COVID-19 pandemic year (2021).

Table 5. General Outdoor Activities Highest Natural Recreation Participation Rates and One- and Five- Year Growth Rates	
Participation	Activity
115,814	Walking for Fitness
58,697	Hiking
48,977	Running/ Jogging
25,111	Golfing
20,452	Wildlife Viewing
Five Year CAGR 2016 to 2021	One Year CAGR 2020 to 2021
General Outdoor Activities	
Golfing (off course DR)	Trail Running
Trail Running	Golfing (off course DR)
Hiking (day)	Horseback Riding
Skateboarding	Bird Watching
Camping (> 1/3 mile from home/ vehicle)	Walking for Fitness

Source: CAGR - Sports Fitness Industry Association Topline Participation Report, 2022

Local/Regional Recreation Participation

Market Drawing Area

Key to understanding local/ regional recreation participation is identifying what 'local should include. Recreation use/ demand is location/ place based. Users/ visitors chose a park experience based upon a variety of factors, but once they arrive, and use the facilities, it is possible to understand where they are coming from through use of internal and external primary and secondary data sources.

A Market Drawing Area refers to the geographic area that the majority (e.g., +/- 60 percent) of the users/ visitors to a destination are residing within. The creation of a Market Drawing Area provides for the ability to generate economic and demographic data as well as recreation market preferences for those individuals living within the Market Drawing Area.

The Market Drawing Area for a park can be determined through reviewing several sources of data. The following explains the sources and how they are used to create a Market Drawing Area for ORP.

1. Maryland 2019-2023 Maryland Land Preservation and Recreation Plan (LPRP or SCORP)
2. Baltimore County Land Preservation, Parks and Recreation Plan Data (LPPRP)
3. Oregon Ridge Nature Center Council Memberships
4. Oregon Ridge Lodge FY 19 Permits/License Reports
5. Oregon Ridge User Group Interviews

These data points are not universal and represent a subset of users. However, they can be used as a proxy for where visitors are coming from, can be checked against primary market survey research, and verified through conversation with ORP Program Managers.

Primary Market Survey Data

The listed sources were reviewed to identify a preliminary Market Drawing Area. The most recent Baltimore County LPPRP survey does not provide insight on distance traveled to parks and recreation area, nor is it statistically valid. However, the 2019-2023 Maryland Land Preservation and Recreation Plan (MD LPRP), is statistically valid, was completed prior to the arrival of COVID-19, and does provide information on travel distances for outdoor recreation users. Therefore, the Maryland LPRP is the starting point for analysis.

The MD LPRP divided the state into four regions and Baltimore County was considered part of the Central Region which includes the City of Baltimore, Baltimore County, Montgomery County, Howard County, Carroll County, Harford County and Cecil County. Survey respondents were queried as to 'Travel Time' through the following question: "When visiting an outdoor recreational area, what is the average travel time from your home". The Central Region respondents indicated the following regarding travel times:

- Under 30 Minutes: 41%
- 30 Minutes to 1 Hour: 39%
- Over an Hour: 20%

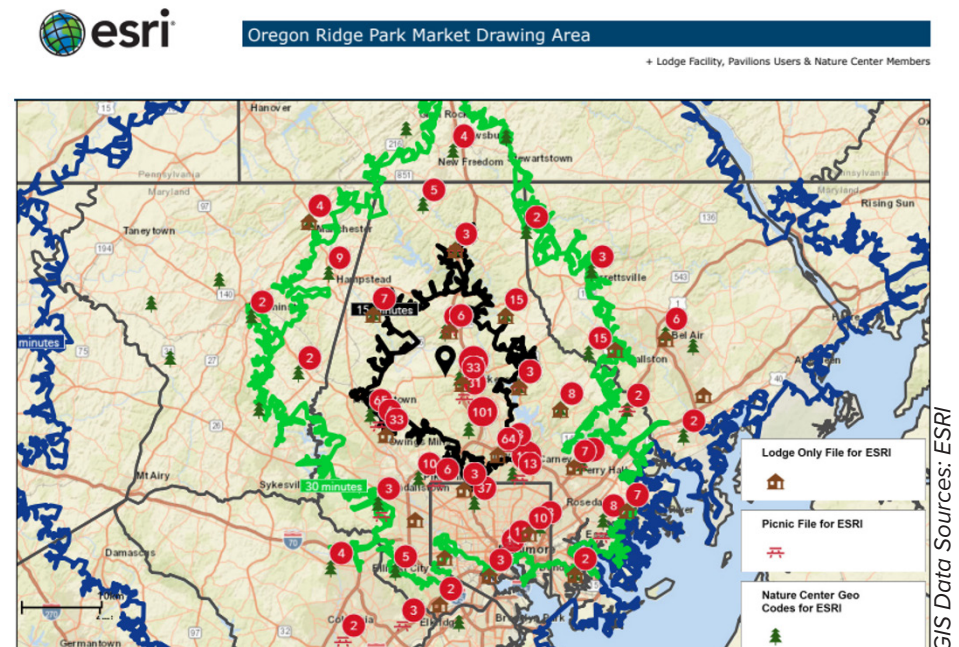
This drawing area was used as an initial filter.

Zip Code Data

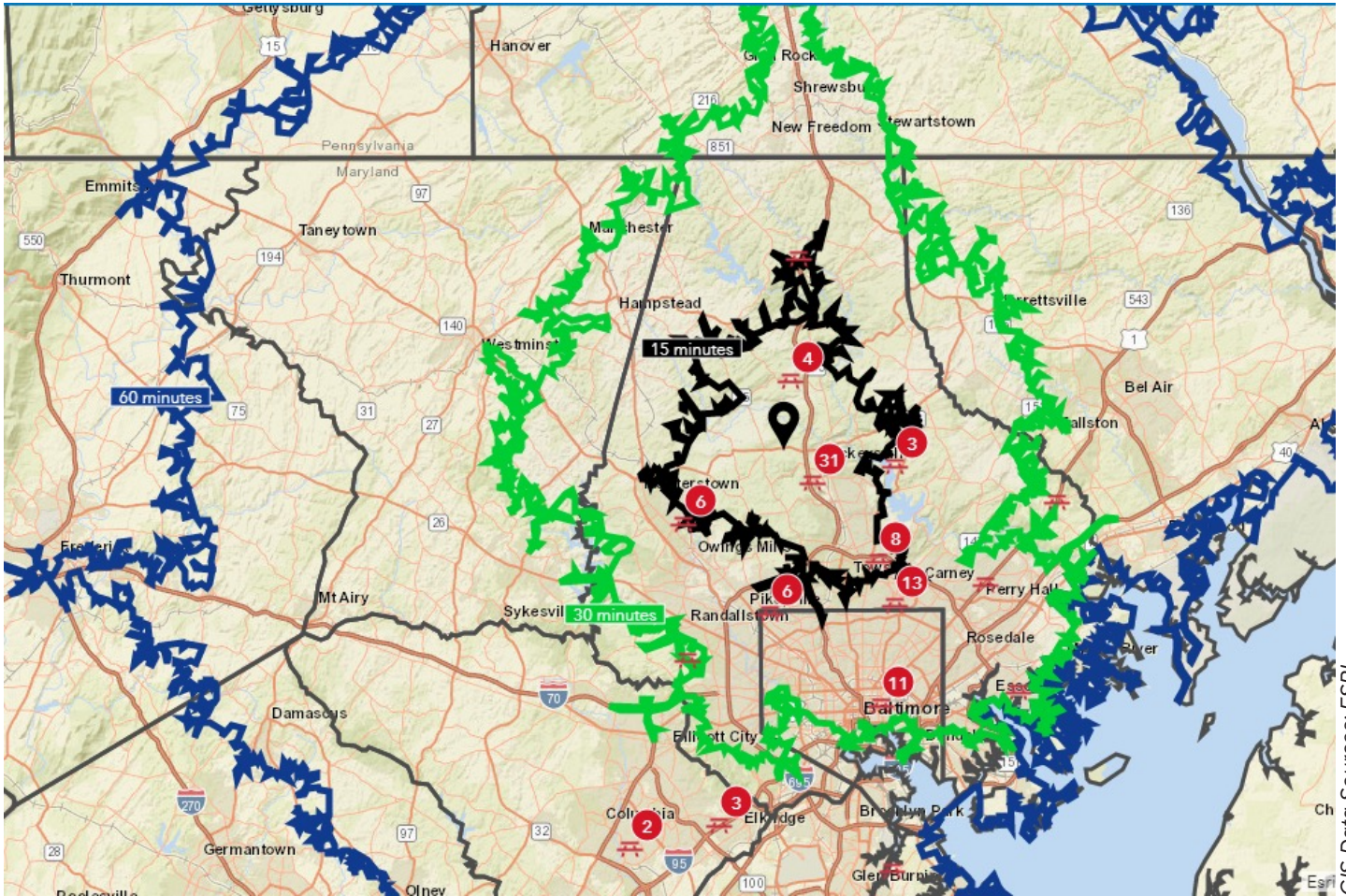
Through discussions with the Nature Center and Lodge managers, zip code data that could be geo-tagged data and that could further inform the Market Drawing Area for ORP was identified. Data was collected, sorted, and geocoded from ORNC Council Membership for 2022 as well as the Lodge permit and license data for FY19. This geo-tagged data represents sponsoring individuals/ groups for events but not attendees.

Nature Center Council Memberships also represent a subset of all users. There was no available zip code data for all other users groups, (e.g., softball, cycling, etc.) as well as individual park attendance (i.e. playground use, runners, walkers, etc.). Available geo-tagged data as a 'proxy' for users.

Available zip codes (i.e., Lodge & Picnic Pavilion Rental and Nature Center Membership) were converted to latitudes and longitudes and loaded it into ESRI Business Analyst On-line (ESRI BAO). This data was geo-tagged and then overlaid on a Market Drawing Area of 15-, 30- and 60-minutes' drive to the park to identify what percentage of the Lodge and Nature Center data on users appeared to occur within these boundaries. The exhibit below illustrates the Market Drawing Area boundaries and the geocoded data for Nature Center membership (i.e., Green Trees Symbols), Lodge Picnic Pavilions (i.e., Red Picnic Table Symbol) and Lodge Meeting Facilities (i.e., Brown Shelter Symbol).



Baltimore County and the largest percentage come from within a 30-minute drive to ORP. Based upon the Maryland SCORP survey data, a review of these data points and discussions with park representatives and user groups, using the Market Drawing Area of 15-30 and 60 minutes is a reasonable assumption for analysis purposes. However, a greater weight will be placed on the two proximate drive times (e.g., 15 and 30 minutes) for findings.



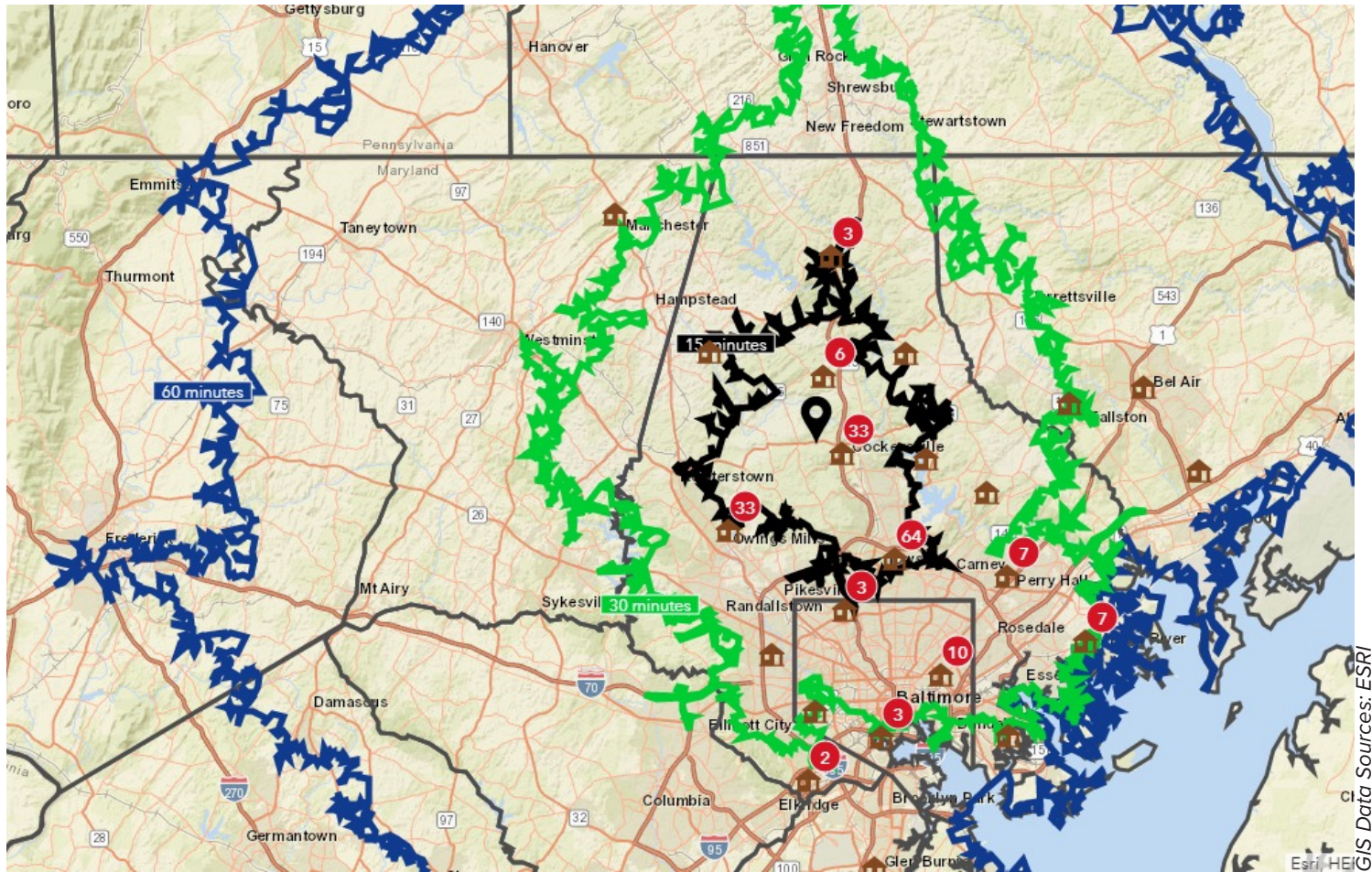
Inventory/Listening/Assessment Lodge Side Usage - Picnic Pavilions FY 19 (1)

Majority of Picnic Functions Point of Contacts are located within Baltimore County and within 15- minute drive to ORP. Over 70 percent of the Picnic Pavilion rentals are identified as Profit vs. Non Profit Organizations.

Note: Red Dots with Number represent incident of that Zip Code.

(1) Geocode data on Nature Center Pavilions was not available

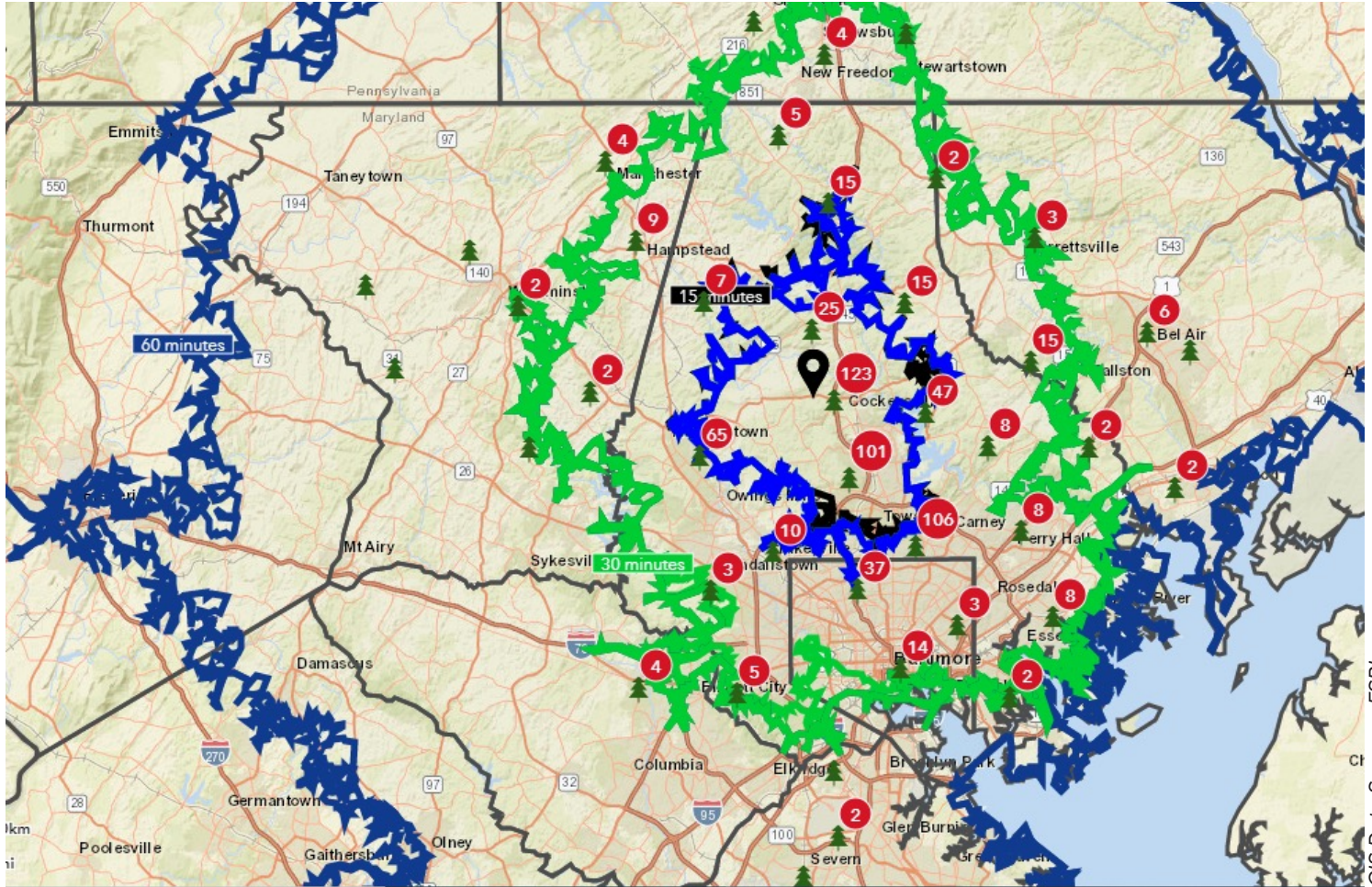
This analysis confirms that the data provided in the Maryland LPRP and Baltimore County LPPRP are both reasonable data sources to leverage for understanding Local/Regional Recreation Participation and Priorities.



Inventory/Listening/Assessment Lodge Side Usage - Meeting Space FY 19

Majority of Lodge Functions Point of Contacts are located within Baltimore County, but the locations are spread between a 15- and 30-minute drive to ORP. Over 90 percent of the users are identified as Non Profit vs. Profit Organizations.

Note: Red Dots with Number represent incident of that Zip Code.



GIS Data Sources: ESRI

Inventory/Listening/Assessment Nature Center Membership FY22

Majority of Nature Center Membership is from individuals within Baltimore County, but members do exist in surrounding counties. Approximately one third of members are outside the 15-minute drive time to the Park.

Note: Red Dots with Number represent incident of that Zip Code.

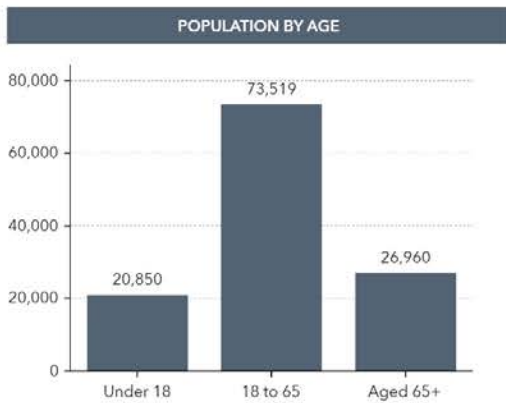


121,326 Population
48,178 Households
2.32 Avg Size Household
43.8 Median Age
\$93,766 Median Household Income
\$441,160 Median Home Value
195 Wealth Index
113 Housing Affordability
49 Diversity Index

AT RISK POPULATION

8,965 Households With Disability
28,538 Population 65+
3,336 Households Without Vehicle

Language Spoken (ACS)	Age 5-17	18-64	Age 65+	Total
English Only	15,177	62,010	21,836	99,023
Spanish	780	2,790	515	4,085
Spanish & English Well	745	2,138	425	3,308
Spanish & English Not Well	9	557	58	624
Spanish & No English	26	95	32	153
Indo-European	773	4,134	1,329	6,236
Indo-European & English Well	766	3,796	1,086	5,648
Indo-European & English Not Well	7	311	194	512
Indo-European & No English	0	26	49	75
Asian-Pacific Island	725	3,550	890	5,165
Asian-Pacific Isl & English Well	691	2,967	667	4,325
Asian-Pacific Isl & English Not Well	35	437	168	640
Asian-Pacific Isl & No English	0	146	55	201
Other Language	84	1,559	103	1,746
Other Language & English Well	75	1,481	103	1,659
Other Language & English Not Well	9	78	0	87
Other Language & No English	0	0	0	0



POVERTY AND LANGUAGE

8% Households Below the Poverty Level
3,792 Households Below the Poverty Level
32 Pop 65+ Speak Spanish & No English

POPULATION AND BUSINESSES

148,798 Daytime Population
8,250 Total Businesses
114,571 Total Employees

Inventory/Listening/Assessment-Market Drawing Area Profile 0-15 Minutes to ORP

Note: ESRI's Diversity Index captures the racial and ethnic diversity of a geographic area in a single number, from 0 to 100. The Diversity Index allows for efficient analysis and mapping of seven race groups that can be either of Hispanic or non-Hispanic origin—a total of 14 separate race/ethnic groupings.

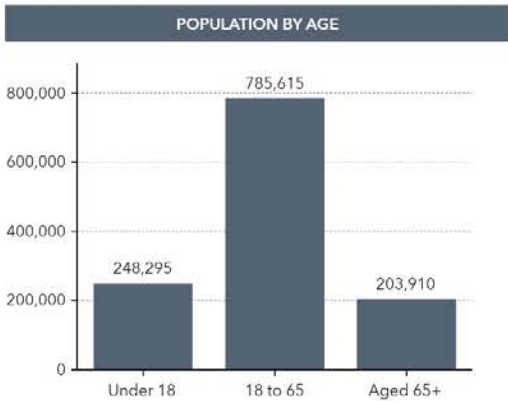


1,237,820 Population **491,431** Households **2.44** Avg Size Household **38.8** Median Age **\$64,405** Median Household Income **\$265,022** Median Home Value **97** Wealth Index **122** Housing Affordability **64** Diversity Index

AT RISK POPULATION

122,654 Households With Disability **218,545** Population 65+ **83,647** Households Without Vehicle

Language Spoken (ACS)	Age 5-17	18-64	Age 65+	Total
English Only	162,997	683,057	175,598	1,021,652
Spanish	11,794	33,905	2,130	47,829
Spanish & English Well	10,728	24,242	1,697	36,667
Spanish & English Not Well	986	7,565	323	8,874
Spanish & No English	80	2,098	109	2,287
Indo-European	6,555	32,681	7,653	46,889
Indo-European & English Well	6,309	29,237	5,316	40,862
Indo-European & English Not Well	246	2,840	1,609	4,695
Indo-European & No English	0	604	727	1,331
Asian-Pacific Island	3,340	21,889	3,374	28,603
Asian-Pacific Isl & English Well	3,035	18,106	1,873	23,014
Asian-Pacific Isl & English Not Well	304	3,061	941	4,306
Asian-Pacific Isl & No English	0	722	561	1,283
Other Language	4,228	21,239	1,469	26,936
Other Language & English Well	3,930	19,970	1,223	25,123
Other Language & English Not Well	299	1,084	152	1,535
Other Language & No English	0	185	94	279



POVERTY AND LANGUAGE

14% Households Below the Poverty Level **64,829** Households Below the Poverty Level **109** Pop 65+ Speak Spanish & No English

POPULATION AND BUSINESSES

1,228,522 Daytime Population **46,167** Total Businesses **593,180** Total Employees

Inventory/Listening/Assessment-Market Drawing Area Profile 15-30 Minutes to ORP

Note: ESRI's Diversity Index captures the racial and ethnic diversity of a geographic area in a single number, from 0 to 100. The Diversity Index allows for efficient analysis and mapping of seven race groups that can be either of Hispanic or non-Hispanic origin—a total of 14 separate race/ethnic groupings.

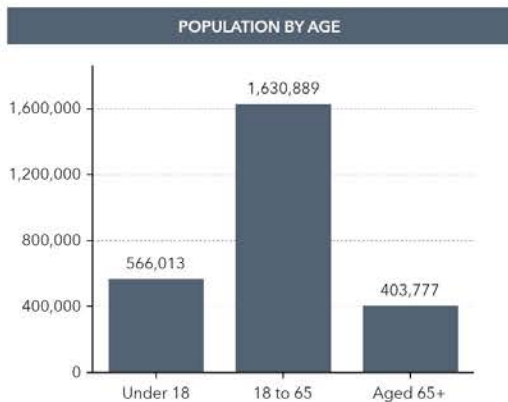


2,600,682 Population
958,956 Households
2.67 Avg Size Household
39.7 Median Age
\$89,771 Median Household Income
\$349,388 Median Home Value
148 Wealth Index
132 Housing Affordability
65 Diversity Index

AT RISK POPULATION

208,869 Households With Disability
434,332 Population 65+
58,765 Households Without Vehicle

Language Spoken (ACS)	Age 5-17	18-64	Age 65+	Total
English Only	340,472	1,251,867	328,051	1,920,390
Spanish	49,653	158,181	12,311	220,145
Spanish & English Well	46,021	113,715	7,658	167,394
Spanish & English Not Well	2,856	30,333	2,823	36,012
Spanish & No English	776	14,133	1,830	16,739
Indo-European	13,821	70,226	14,948	98,995
Indo-European & English Well	13,052	64,581	12,103	89,736
Indo-European & English Not Well	672	4,700	2,003	7,375
Indo-European & No English	97	945	841	1,883
Asian-Pacific Island	10,670	63,179	14,413	88,262
Asian-Pacific Isl & English Well	10,034	53,573	9,010	72,617
Asian-Pacific Isl & English Not Well	597	8,479	3,753	12,829
Asian-Pacific Isl & No English	39	1,126	1,650	2,815
Other Language	8,557	46,195	5,049	59,801
Other Language & English Well	7,953	43,229	3,938	55,120
Other Language & English Not Well	594	2,634	625	3,853
Other Language & No English	10	333	485	828



POVERTY AND LANGUAGE

8% Households Below the Poverty Level
71,051 Households Below the Poverty Level
1,830 Pop 65+ Speak Spanish & No English

POPULATION AND BUSINESSES

2,502,331 Daytime Population
88,139 Total Businesses
1,137,843 Total Employees

Inventory/Listening/Assessment-Market Drawing Area Profile 30-60 Minutes to ORP

Note: ESRI's Diversity Index captures the racial and ethnic diversity of a geographic area in a single number, from 0 to 100. The Diversity Index allows for efficient analysis and mapping of seven race groups that can be either of Hispanic or non-Hispanic origin—a total of 14 separate race/ethnic groupings.

Local/Regional Recreation Participation and Priorities

Data exists within both the Maryland LPRP and the Baltimore County LPPRP regarding residents’ preferences for types of recreational activities and settings. Tables 6 and 7 provide two sets of data and are based upon statistically valid survey data generated for the Maryland LPRP in 2018. The first two tables address:

- Recreation participation rates by the relevant region which includes Baltimore County
- Recreational Areas Desired to Be Improved

Table 6. Oregon Ridge Park Local/ Regional Recreation Trend Surveys		
MD LPRP 2019-2023: Recreation Participation Rates	Central Region (includes Baltimore County)	State
Trail Based Activities (e.g., hiking, biking, running, horseback riding, off road vehicle use)	87%	86%
Park Outdoor Activities (e.g., playgrounds, picnicking, athletic team sports)	57%	57%
Water Recreation (e.g., boating, sailing, paddling, swimming)	49%	52%
Historical and Cultural (e.g., historical sites, special events, historic reenactments)	37%	37%
Nature / Wildlife related recreation (e.g. bird-watching, visiting natural areas, nature programs)	34%	36%
Fishing	28%	30%
Camping	28%	29%
Winter recreation (e.g., skiing, sledding, snowmobiling, snowshoeing)	21%	23%
Hunting or shooting sports	16%	17%
Others	4%	4%

Source: 2019-2023 Maryland Land Preservation and Recreation Plan (LPRP), Baltimore County Land Preservation, Park, and Recreation Plan (LPPRP), 2023

Table 7. Oregon Ridge Park Local/ Regional Recreation Trend Surveys		
MD LPRP 2019-2023: Central Region Top Two Areas to Be Improved	Top One	Combined 1 & 2
Trail Based Activities (e.g., hiking, biking, running, horseback riding, off road vehicle use)	22%	34%
Park Outdoor Activities (e.g., playgrounds, picnicking, athletic team sports)	21%	32%
Water Recreation (e.g., boating, sailing, paddling, swimming)	15%	22%
Historical and Cultural (e.g., historical sites, special events, historic reenactments)	5%	10%
Nature / Wildlife related recreation (e.g. bird-watching, visiting natural areas, nature programs)	7%	15%
Fishing	4%	9%
Camping	3%	8%
Winter recreation (e.g., skiing, sledding, snowmobiling, snowshoeing)	2%	5%
Hunting or shooting sports	3%	6%
Others	17%	22%

Source: 2019-2023 Maryland Land Preservation and Recreation Plan (LPRP), Baltimore County Land Preservation, Park, and Recreation Plan (LPPRP), 2023
 June 2023

The second pair of tables, Tables 8 and 9 are generated by the Baltimore County 2022 LPPRP. This data is not statistically valid but represents the most recent perspectives from those who chose to respond to the survey by Planning Region and by the overall County.

- Top 10 Recreational Amenities Desired
- Priorities for Capital Investments

The color coding in these tables represented by Green, Yellow, Orange, and Red, reflects high priority items (e.g., Green) and lowest priority items (e.g., Red).

These Local/ Regional findings consistently identify Trail-Based Activities as those with the highest percentage of participation, and highest priority for improving and investing. Trail based activities, as defined, includes both natural trail systems as well as paved trail systems. Trail-Based Activities are closely followed by Park Outdoor Activities (i.e., Playgrounds, Picnicking, Sports Teams).

Table 8. Baltimore County LPPRP 2021: Top 10 Amenities Desired in Greater Quantities		
	North Central	Baltimore County
Trail Based Activities (e.g., hiking, biking, running, horseback riding, off road vehicle use)		
Bicycle Lanes	40%	38%
Nature Trails	35%	35%
Paved Paths	25%	25%
Park Outdoor Activities (e.g., Playgrounds, Picnicking, Athletic Team Sports)		
Pickleball Courts	24%	20%
Athletic Fields	20%	19%
Dog Parks	18%	15%
Ball Diamonds	17%	13%
Nature/ Wildlife Related Recreation (e.g., Bird-watching, Visiting Natural Areas, Nature Programs)		
Undeveloped Green Spaces	28%	25%
Water Recreation (e.g., Boating, Sailing, Paddling, Swimming)		
Canoe and Kayak Launches	18%	14%
Others		
Indoor Sports Fields	15%	10%

Source: 2019-2023 Maryland Land Preservation and Recreation Plan (LPRP), Baltimore County Land Preservation, Park, and Recreation Plan (LPPRP), 2023

Table 9. Baltimore County LPPRP 2021: Preferred Capital Investment Budget Allocations		
	North Central	Baltimore County
Trail Based Activities (e.g., hiking, biking, running, horseback riding, off road vehicle use)		
Walking and Cycling Paths	16%	15%
Park Outdoor Activities (e.g., Playgrounds, Picnicking, Athletic Team Sports)		
Outdoor Recreation	9%	9%
Diverse Recreational Facilities	15%	12%
Small Park Amenities	5%	7%
Nature/ Wildlife Related Recreation (e.g., Bird-watching, Visiting Natural Areas, Nature Programs)		
Nature, Arts, and History	8%	10%
Green and Open Space	8%	8%
Water Recreation (e.g., Boating, Sailing, Paddling, Swimming)		
N/A		
Others		
Indoor Recreation	4%	4%
Park Acquisition	16%	16%
Maintenance and Repair	13%	14%

Source: 2019-2023 Maryland Land Preservation and Recreation Plan (LPRP), Baltimore County Land Preservation, Park, and Recreation Plan (LPPRP), 2023

June 2023

CURRENT RECREATION OPPORTUNITY CONCLUSIONS

Current recreation opportunity analysis provides an opportunity to compare demonstrated recreation demand (e.g., ORP Attendance) against local/ regional and national primary market research sources for recreation use and priorities (e.g., SFIA, MD LPRP, BC LPPRP) currently existing at ORP.

Both national and local/ regional data indicate high support for trail-based, park outdoor activities and nature/wildlife recreation at ORP. Trail-based activities include walking, running, hiking, and biking. ORP's open space, grass and trail systems are attractive amenities for individual use as well as permitted groups using the areas for mountain biking and cyclocross activities. Park outdoor activities include playgrounds, picnic areas and athletic sports. Interviews with park managers verify daily use of the playground throughout the year. Picnic pavilion rentals at both the Nature Center and the Lodge demonstrate continued demand for this use. Permits for the softball fields and usage of these fields for other athletic teams (e.g., flag football and soccer) indicate continued support for these areas. Nature/wildlife recreation includes bird watching, visiting natural areas and natural programs. The ORNC and its programs and services supports high usage of its drop in, scheduled and special events activities.

The current recreation Opportunity Analysis supports continued use of trail systems, picnic areas, open space, sports fields, and nature-based activities at ORP.

FUTURE RECREATION ACTIVITY ASSESSMENT

Identifying interest in future recreational activities includes leveraging primary market research data (e.g., surveys) and identifying the market potential for recreational activities. Understanding the potential for recreational and leisure activities is possible using ESRI Business Analyst Sports and Leisure Market Potential data. The following paragraphs introduce the methodology behind ESRI Business Analyst Online Market Potential Index (MPI) and how it provides support for future recreational activities analysis at ORP.

ESRI BAO Market Potential

This report leverages ESRI BAO data to identify the potential sports and leisure activities that correlate to the categories of activities identified in the Baltimore County LPPRP. ESRI's 2021 Market Potential data measures the likely demand for a product or service in an area. The research leveraged MPI analysis with selected variables from the Sports and Leisure Potential that relate to existing and potential activities that are possible at ORP based upon the setting and terrain.

The methodology for the MPI is based upon an estimate of the number of consumers and a MPI for all items. The MPI compares the demand for a specific product or service in an area with the national demand for that product or service. The market potential is developed by combining 2021 Tapestry Segmentation data with the MRI Survey of the American Consumer, 2020 Doublebase from MRI-Simmons. ESRI's 2021 Market Potential database incorporates the next generation of Tapestry Segmentation with new and revised items from the Doublebase 2020 consumer surveys to provide a fresh outlook on local consumer preferences.

The 2021 data includes more than 2,500 items collected from MRI-Simmons surveys, grouped into categories. Doublebase 2020 is an integration of information from four consumer surveys. Each survey respondent can be identified by Tapestry segment, so a rate of consumption by Tapestry segment can be determined for a product or service for any area. The elements of the calculation are calculated as follows:

- The **Expected Number of Consumers** (households or adults) for a product or service in an area is computed by applying the consumption rate for Tapestry market segment to households or adults in the area belonging to Tapestry segment “N” and summing across 67 Tapestry segments.
- The **Local Consumption Rate** for a product or service for an area is computed as the ratio of the expected number of consumers for a product or service in the area to the total households or adults in the area.
- The **Market Potential Index** for a product or service for an area is the ratio of the local consumption rate for a product or service for the area to the US consumption rate for the product or service, multiplied by 100.

This work leverages the identified MPI for each area and applies it to the population within the Market Drawing Area. The results of this application are provided Table 10 on the following page. Each Activity Category includes the estimated population available in 2021 and 2026 that would have the propensity to participate in the recreational and/or leisure activity. The MPI population figures are then divided by the 2021 population within each respective Market Drawing Area travel ring. Within each activity category and by Market Drawing Area, there are listed the population that is likely to participate. The color coding is represented by Green, Yellow, Orange, and Red, and reflects high priority items (e.g., Green) and lowest priority items (e.g., Red) across a spectrum.

Table 10 confirms that the recreational potential remains high for trail-based activities as represented by the combined population figures and their percentage of the population. Park outdoor and natural and wildlife have the second highest potential followed by Cultural Activities. Many of the Cultural Activities occur within the ORP Concert Shell and are part of full park rental events.

Table 10. ESRI BAO Sports and Leisure Potential in Relation to Market Drawing Area									
Sports and Leisure Market Potential			Participated/ Went or Did Activity within the Last 12 Months						
			Trail-based Activities						
	Population 2021 (1)	Population 2026	Mt. Biking	Road Biking	Hiking	Horseback Riding	Jogging and Running	Walking for Exercise	
0 - 15 Minutes Drive to Site	107,805	109,417	3,916	11,206	15,264	2,355	13,171	27,901	
% of 2026 Population			4%	10%	14%	2%	12%	26%	
15 to 30 Minutes Drive to Site	1,260,218	1,258,545	40,467	100,439	134,051	24,936	120,954	253,268	
% of 2026 Population			3%	8%	11%	2%	10%	20%	
30 to 60 Minutes Drive to Site	3,690,441	3,764,994	126,254	312,368	429,163	69,640	368,996	789,552	
% of 2026 Population			3%	8%	12%	2%	10%	21%	
Sports and Leisure Market Potential			Park Outdoor Activities						Nature/ Wildlife Activities
	Population 2021 (1)	Population 2026	Football	Frisbee	Soccer	Softball	Yoga	Dog Ownership	Bird-watching
0 - 15 Minutes Drive to Site	107,805	109,417	3,727	3,842	4,221	1,847	10,455	10,604	4,741
% of 2026 Population			3%	4%	4%	2%	10%	10%	4%
15 to 30 Minutes Drive to Site	1,260,218	1,258,545	44,800	40,042	44,940	25,727	100,779	109,304	44,802
% of 2026 Population			4%	3%	4%	2%	8%	9%	4%
30 to 60 Minutes Drive to Site	3,690,441	3,764,994	120,029	117,989	131,326	72,598	307,687	337,189	134,456
% of 2026 Population			3%	3%	4%	2%	8%	9%	4%
Sports and Leisure Market Potential			Cultural Activities						
	Population 2021 (1)	Population 2026	Attended Classical Music Concert	Attended Country Music Concert	Went to Live Theater				
0 - 15 Minutes Drive to Site	107,805	109,417	5,550	6,319	16,193				
% of 2026 Population			5%	6%	15%				
15 to 30 Minutes Drive to Site	1,260,218	1,258,545	45,549	60,887	135,092				
% of 2026 Population			4%	5%	11%				
30 to 60 Minutes Drive to Site	3,690,441	3,764,994	129,261	191,130	420,982				
% of 2026 Population			4%	5%	11%				

Note: (1) Percentages are based on 2021 population

Source: These data are based upon national propensities to use various products and services, applied to local demographic composition.

Usage data were collected by MRI-Simmons in a nationally representative survey of U.S. households. EESR forecasts for 2021 and 2026.

FUTURE RECREATION OPPORTUNITY CONCLUSIONS

Identifying the opportunity for future recreational uses at ORP can be evaluated by comparing existing attendance for recreational activities at the park to preferences stated in the Baltimore County LPPRP and data from the ESRI BAO Sports and Leisure Market Potential. Table 11 compares data from each of these sources by Recreational Activity Category.

Table 11. Comparative Data Sources for Determining Future Recreational Activities					
Oregon Ridge Park FY 10 Attendance Data		Baltimore County LPPRP (North Central Region)		ESRI BAO (15-30 minute drive time to ORP)	
Trail-based Activities (e.g., hiking, biking, running, horseback riding, off road vehicle use)					
Demonstrated Demand	% of Use	Local/ Regional Desired Amenities	% of Responses	Market Potential Population	% of Population
Area C (Mt. Bike, Cyclocross, Running, etc.)	3.1%	Bicycle Lanes Nature Trail Paved Paths	40% 35% 25%	Mt. Biking Road Biking Hiking Horseback Riding Jogging and Running Walking for Exercise	3% 8% 11% 2% 10% 20%
Park Outdoor Activities (e.g., playgrounds, picnicking, athletic team sports)					
Demonstrated Demand	% of Use	Local/ Regional Desired Amenities	% of Responses	Market Potential Population	% of Population
Lodge Picnic Pavilions Sports Fields	9% 19%	Pickleball Courts Athletic Fields Dog Parks Ball Diamonds	24% 20% 18% 17%	Football Frisbee Soccer Softball Dog Ownership Yoga	4% 3% 4% 2% 9% 8%
Nature/ Wildlife Related Recreation (e.g., bird-watching, visiting natural areas, nature programs)					
Demonstrated Demand	% of Use	Local/Regional Desired Amenities	% of Responses	Market Potential Population	% of Population
Nature Center (NC) Art Events NC Hobby Events NC Social Events NC Nature Programs NC Summer Camps NC Special Events NC Non Registered Events	0.4% 0.3% 0.6% 8.4% 0.7% 3.6% 31.5%	Undeveloped Green Spaces	28%	Bird-watching	4%
Other					
Demonstrated Demand	% of Use	Local/ Regional Desired Amenities	% of Responses	Market Potential Population	% of Population
Whole Park Events Lodge Facility	12% 11%	Indoor Sports Fields	15%	Attended Classical Music Concert Attended Country Music Concert	3% 5%

The comparative analysis supports the continuation of future existing uses, including trail-based outdoor park and nature activities. Additionally, it introduces the potential for additional types of trail and outdoor park activities including multi-use trail systems, and dog parks, as well as flat open spaces for athletic fields that do not compete with activities existing in Area C, the lawn near the Lodge.

COMPARABLE MARKET ANALYSIS

The recreation and leisure facilities and programs provided at ORP exist within a market in which there are other public, non profit, and private providers of similar services. The demand analysis identified that the majority of users of ORP come from areas between 15- and 30-minute drive to the park. A summary, by recreational and leisure facility land uses, of other entities providing similar services was identified to compare how their attributes and pricing compares to that offered at ORP.

RENTAL FACILITIES

Other public and non profit providers of rental facilities within the Market Drawing Area (MDA) were evaluated. There are eleven facilities highlighted, five Baltimore County facilities, one non profit within Baltimore County, two Howard County and three facilities within the City of Baltimore. The focus was on banquet seating arrangements for comparison. ORP is on the smaller size of the range and the rates are most comparable with the City of Baltimore's Middle Branch Water Resource Center venue. Other facilities are charging approximately twice the rental prices of the ORP Lodge. Tables 12 and 13 on the following two pages outlines the rental facility characteristics.

Table 12. Comparative Data Sources Rental Facilities within the Market Drawing Area

Rental Facility Venues											
	Baltimore County					City of Baltimore				Howard County	
	Oregon Ridge Lodge	Northeast Regional Center	Honeygo Run Regional Park	Randallstown Community Center	Southeast Regional Recreation Center	Irvine Nature Center	Cylburn Arboretum	Howard P. Rawlings Conservatory	Middle Branch Rowing & Water Resource Center	Robinson Nature Center	Belmont Manor and Historic Park
Owner	Baltimore County Parks	Baltimore County Parks				Irvine Nature Center Non Profit	City of Baltimore	City of Baltimore	City of Baltimore	Howard County Parks	Howard County Parks
Operator	Baltimore County Parks	Baltimore County Parks				Irvine Nature Center Non Profit	City of Baltimore	City of Baltimore	City of Baltimore	Howard County Parks	Howard County Parks
Caterer	No Preferred Caterers					Approved Caterers	Preferred Cater and/or And additional \$500.00	Preferred Cater and/or an additional \$500.00		Choice of Caterer	Choice of Caterer
Venue Type	Rustic Lodge	Meeting Rooms within Recreational Facilities				Tented Patio	Historic Mansion	Historic Gardens	Standard Facility	Nature Center	Historic Mansion
Available Spaces	Sequoia, Seneca and Shawan Rooms	1	1	3	1	Outdoor Amphitheater	Vollmer Room	Rawlings South Pavilion		Nature Center	Mansion
	Grounds Hubert Stage/Amphitheater					Gazebo	Clyburn Mansion Green House Classrooms	H.P. Rawlings Conservatory		Grounds/Trails	Grounds, Tented Area
Capacity	Sequoia Bqt: 100-120	50 to 75	50 to 75	Multipurpose Room 360 Theater and 185 Bqt	50 to 75	180	Vollmer 100/Clyburn Mansion 62	Conservatory 60	120 Banquet	160	300
Rental Rates											
Social Events	4 Hr is Block	1 hour Must be out by Closing				8 hour rental	4/6/ or 7 hour Options	4/6/ or 7 hour Options	4 Hour Minimum 8 Hour Max	9 hours	8 hours
In Season	April to October (Sequoia Room Rates- Assuming 8 Hour Rental based upon 4 hour rates)	\$30/Hour Rental and \$20/Hour Staffing Fee - Non Profits Don't Pay Rental Just Staff Fee. Rates below Reflect 8 Hour Rental				April to November	April to November (Priced for Max 7 hours) Vollmer 100	April to November (Priced for Max 7 hours) conservatory 60 Ppl	Year Round		April to October
M-Thursday	\$800 Profit/ \$500 Non Profit					\$4,150	\$1,750	\$1,400	\$800	\$4,000	\$5,500.00
Friday, Sunday	\$1,500 Profit/\$1,000 Non Profit					\$4,150	\$3,150	\$2,800	\$900/\$1200	\$4,000	\$5,500.00
Saturday	\$1,500 Profit/\$1,000 Non Profit					\$4,150	\$4,550	\$4,200	\$1,200	\$4,000	\$5,500.00
Off - Season						\$4,150				\$4,000	\$5,500.00
M-Thursday	Same					\$4,150	\$1,750	\$1,400		\$4,000	
Friday, Sunday	Same					\$4,150	\$2,100	\$1,750	Jan/Feb \$650 or \$900 SN and FR1200	\$4,000	
Saturday	Same	\$240/Base Rental Plus Staff Time				\$4,150	\$3,500	\$3,150	Jan/Feb \$650 or \$1200	\$4,000	
Included Items	Parking, Tables, Chairs, Brides Room, Catering Kitchen, Basic AV	Parking, Tables, Chairs, AV and WIFI				Parking, Tables, Chairs, Tent, Brides Room	Parking, Tables & Chairs	Parking, Tables & Chairs	Parking, Tables & Chairs	Parking, Limited Tables and Chairs, Access to Nature Center and Trails	House, Parking, Tent with Lighting, Tent Floor, Cabana, Fans, Tables and Chairs, Chair Pads, Catering Kitchen
Business Events											
M-Thursday	See Above Profit Rates						\$1,050 to \$1,900			N/A	
Discounts	No Discounts for Baltimore County Residents									For Howard County Residents (Approximately 15%)	
Air Conditioning	No	Yes				None				Yes	N/A Must Be Brought In

Source: Respective entity websites

Table 13. Comparative Data Sources Rental Facilities within the Market Drawing Area: Amphitheaters

	ORP	Merriweather Post	MECU Pavilion	Chrysalis at Merriweather Park
Location	Baltimore County	Howard County	City of Baltimore	Howard County
Operator	Baltimore County	IMP LLC	Live Nation/ SMG	InnerArbor Trust
Nature of Lease	N/A	Private - 40 year lease	Private	Non profit
Ownership	Baltimore County	Downtown Columbia Arts and Culture Commission	Municipal Credit Union of Baltimore	Non profit
Occupancy/ PPL capacity of venue	4,000	19,000	4,600	5,000
Amenities				
Food Service	No formal concession space	Yes, concessions on site	Yes, concessions on site	Yes, concessions on site
Parking	On site maximum of 1,350 IF dry weather	Off site	Off site	Off site
Restrooms	Yes, Lodge and portable	Yes, complex	Yes, complex	Yes, complex
Covered Seating (Y/ N and %)	No	Yes, partial	Yes, partial	Yes, partial
Season of Operation	Year round, weather permitting	May to October	May to September	May to September
Rental Rates				
For Profit	\$2,000/ Event Day Saturday; \$1,500 F/SN; \$1,000 M-Th	N/A	N/A	\$350/ 4hr minimum; \$10,000 for Event Day
Not for Profit	\$1,800/ Event Day Saturday; \$1,000 F/SN; \$1,000 M-Th	N/A	N/A	\$270/ 4hr minimum

PICNIC SHELTERS

Picnic pavilions and shelters are available throughout Baltimore County Parks. The 2017 Baltimore County LPPRP estimates that there are 91 picnic pavilions within the county. Research focused on providing insight to the size and price of those picnic pavilions located within other regional parks. The regional parks have a flat rate for up to seven hours of rental, with no difference based upon pavilion size. This compares to ORP which offers both a four (i.e., Nature Center) and five (i.e., Lodge) hour rental window depending on whom you are renting from. The rates are higher than the other regional parks. Table 14 identifies the inventory characteristics.

Table 14. Comparative Data Sources Picnic Pavilions within Market Drawing Area

Picnic Shelters	Location	Size	Pricing - Weekday	Pricing - Weekend	Amenities
Baltimore County Regional Parks					
Oregon Ridge Park					
			Private Rates (Discounts for non profits and Rec Councils 15 - 22%) 5 Hours		
Arts and Science Pavilion	Lodge area	150-200	\$350	\$400	Grills/ Tables/ Outlets
Ridge Pavilion	Lodge area	150-200	\$350	\$400	Grills/ Tables/ Outlets
Westinghouse Pavilion	Lodge area	100	\$200	\$250	Grills/ Tables/ Outlets
Timber Tent	Lodge area	25	\$175	\$175	Grills/ Tables
Pecos Trent	Lodge area	25	\$175	\$175	Grills/ Tables
Kidd's Nature Pavilion	Nature Center	75	\$250	\$250	Grill/ Tables/ Outlets
Lake Pavilion	Nature Center	75	\$250	\$250	Grill/ Tables/ Outlets
Woodland Pavilion	Nature Center	30	\$100	\$100	Tables only
Eastern Regional Park					
	4				
Pavilion A		40	\$240		
Pavilion B		80	\$240		
Pavilion C		120	\$240		
Honeygo Regional Park					
	2				
Picnic Shelter A		60	\$240		
Picnic Shelter B		60	\$240		
Meadowwood Regional Park					
	3				
Pavilion A		50 to 80	\$240		
Pavilion B		50 to 80	\$240		
Pavilion C		50 to 80	\$240		
Reistertown Regional Park and Sportsplex					
	1				
Pavilion A		80	\$240		

Source: Respective entity websites

Table 14. Comparative Data Sources Picnic Pavilions within Market Drawing Area, continued					
Picnic Shelters	Location	Size	Pricing - Weekday	Pricing - Weekend	Amenities
Baltimore County Regional Parks					
Northwest Regional Park	3				
Pavilion A		50 to 80	\$240		
Pavilion B		51 to 80	\$240		
Pavilion C		52 to 80	\$240		
City of Baltimore Parks and Recreation					
Druid Hill Park - Atrium		100	\$150		
Druid Hill Park - Chinese		175	\$205		
Druid Hill Park - Columbus		150	\$175		
Druid Hill Park - Liberty		150	\$175		
Druid Hill Park -Lakeside		150	\$175		
Druid Hill Park - Sundial		75	\$150		
Druid Hill Park - Susquehannock		150	\$150		
Druid Hill Park Swann		100	\$150		
Gwynns Falls Leakin Park Gazebo		15	\$120		
Gwynns Falls Cardin		60	\$235		Electricity
Riverside Park		100	\$205		Electricity
Patterson Park 1		100	\$175		
Patterson Park 2		125	\$175		
Howard County Park			Resident Discount and Non profit (15-17%)		
Alpha Ridge Two		60	\$205/ day	\$205 day	Grills/ Tables
Cedar Lane East		100	\$385/ day		Grills/ Tables
Cedar Lane West		150	\$475/ day		Grills/ Tables
Guilford Park		60	\$205/ day		Grills/ Tables
Hammond Park		60	\$205/ day		Grills/ Tables
High Ridge Park		40	\$330/ day		Grills/ Tables/ Outlets
North Laurel Park		100	\$365/ day		Grills/ Tables/ Outlets
Rockburn Branch		90	\$280/ day		Grill/ Tables/ Outlets/ Patio
Savage Park		100	\$395/ day		Grill/ Tables/ Outlets/ Horseshoe Pits
Waterloo Park		40	\$175/ day		Grills/ Tables/ Outlets
Waterloo Park Large		60	\$205/ day		Grills/ Tables/ Outlets

Source: Respective entity websites

NATURE CENTER

Nature Centers are provided within the Market Drawing area by City and County Park and Recreation Agencies as well as non profits. The scope of operations for most facilities is similar except for the Irvine Nature Center. A review was made of the available non profit financial statements of the Nature Centers, if they existed. Howard County’s Robinson Nature Center receives support from the James and Anne Robinson Foundation. Table 15 provides an overview of the characteristics of these facilities.

Table 15. Comparative Data Sources Nature Centers within Market Drawing Area							
	Oregon Ridge Park	Cromwell Valley Park-Willow Grove Nature Center	Lake Roland Nature and Environmental Center	Marshy Point Nature Center	Irvine Nature Center	Carrie Murray	Robinson Nature Center
Location	Baltimore County	Baltimore County	Baltimore County	Baltimore County	Baltimore County	Baltimore City	Howard County
Operator	Baltimore County/ Oregon Ridge Nature Center	Cromwell Valley Park Council, Inc.	Lake Roland Nature Council	Marshy Point Nature Council	Irvine Nature Center Non profit	Baltimore City Parks and Recreation	Howard County Parks and Recreation
Admission Fees	N	N	N	N	\$5/ Guest Fees; Members Free	N	\$5/ Adults and \$3/ Child and Members Free
Separate Classroom (number)	1	within barn at farm	2	1	Y (TBD)	Y	2
Farm	N	Y	N	N	N	N	N
Aviary	Y	N	N	N	Y	Y	Y
Trails	Y	Y	Y	Y	Y	Y	Y
Outdoor Nature Playground	Y	N	General, not nature	Y	Y	N	Y
Nature Center	Y	Y	Y	Y	Y	Y	Y
Gardens	Y	orchards	Y	Y	Y	Y	Y
Other	N/A	Library	N/A	Library	Native American Site & Butterfly House	N/A	Planetarium, Childrens' Discovery Room

Source: Respective entity websites and 2019 990's Continued on next page

Table 15. Comparative Data Sources Nature Centers within Market Drawing Area, continued

	Oregon Ridge Park	Cromwell Valley Park-Willow Grove Nature Center	Lake Roland Nature and Environmental Center	Marshy Point Nature Center	Irvine Nature Center	Carrie Murray	Robinson Nature Center
Location	Baltimore County	Baltimore County	Baltimore County	Baltimore County	Baltimore County	Baltimore City	Howard County
Operator	Baltimore County/ Oregon Ridge Nature Center	Cromwell Valley Park Council, Inc.	Lake Roland Nature Council	Marshy Point Nature Council	Irvine Nature Center Non profit	Baltimore City Parks and Recreation	Howard County Parks and Recreation
Formal Early Childhood Education	N	N	N	Y	Y	Y	N
School Programming	Y	Y	Y	Y	Y	Y	Y
School Overnight Camps	Y	Y	N/A	N/A	N	N	Y
Programming- Children	Y	Y	Y	Y	Y	Y	Y
Programming- Adults	Y	Y	Y	Y	Y	N	Y
Gift Shop	N	N		Y	Y		Y
Rentals	Y	N/A	Y	Y	Y		Y
Non profit Top Line Revenue 2019 (IRS 990)	\$121,622	\$88,130	\$134,568	\$120,184	\$2,315,467	City Facility	Howard County and the James and Anne Robinson Foundation
Contributions	\$42,106	\$32,616	\$84,125	\$13,168	\$1,330,064		
Program Service Revenue Including Govt. Grants	\$64,983	\$46,739	\$6,960	\$75, 716	\$720,742		
Membership Dues / Investment/ Other Income	\$14,533	\$8,775	\$36,946	\$9,665	\$264,661		

Source: Respective entity websites and 2019 990's

ATHLETIC FIELDS AND BALL DIAMONDS

The 2017 Baltimore County LPPRP estimates that there are 592 ball diamonds within the County and of those, 40 or 6.7 percent, are in the North Central Region that includes ORP. The Baltimore County LPPRP estimates that there are 514 athletic fields within the County and of those, 38 or 7.3, percent are within the North Central Region. Details on the rental rates of ball diamonds and athletic fields was not available.

PLAYGROUNDS

The 2017 Baltimore County LPPRP estimates that there are 259 playgrounds within the County and of those, 14 or 5.4 percent, are in the North Central Region that includes ORP.

DOG PARKS

The 2017 Baltimore County LPPRP did not have a section on dog parks. A review of the Baltimore County website was made to understand the number of dog parks available in the County. Research identified five dog parks within the County, and three of them are located in the Market Drawing Area of ORP (e.g., Hannah More Center and Park, Honeygo Run Regional Park and Lake Roland.)

COMPARABLE MARKET ANALYSIS CONCLUSIONS

The recreational facilities and services within ORP are a part of a larger recreational facility universe. The analysis identifies that there are other providers offering like services in the area, with most of them being within Baltimore County proper. When comparing ORP prices to other Baltimore County parks, ORP rental rates are higher. Conversely, when comparing ORP's prices to another county's and or non profits, they are lower. The project did not include a visit to the competitive market but a review was made from websites that included images of recreational facilities and services. Comparable rental facilities appeared, via web images, to be of higher quality and in better condition which would contribute to their higher prices. While the ORP facilities are meeting market needs, it does appear that improving the quality and condition of the existing facilities could position them for increasing their pricing to improve cost recovery.

RECREATION PROGRAM ASSESSMENT

The analysis resulted in a prioritization of recreation programs for evaluation in the development of the ORPMP.

Trail-based Activities - The summary analysis identifies high rates of usage, as well as high survey response rates for these activities as desired as well as having continued future recreation potential.

- There is no detailed usage data on trail use at ORP; however, interviews with park managers and current permit user groups identify the use of the existing trails for both individual and group use. The Baltimore County LPPRP identifies trail activities as the highest preferred amenity. Paved bicycle lanes were the highest category followed closely by nature trails and paved paths.
- The permitted user groups of Area C (i.e., BYC and NBCC) both indicated a desire and need for a portion of trails that could be used by their groups for training and general local area use for leisure riding.
- The ESRI BAO MPI data identifies support for nature trails used for walking, hiking, and jogging. Both mountain bike and horseback trail systems also have potential demand. The National Recreation Trend data identifies that uses of trail systems (e.g., walking, hiking, trail running, and mountain biking) have positive recreational growth trend rates over the last one- and five-year periods.
Trails expansion and improvement should be considered a high priority for the ORPMP.

Park Outdoor Activities - The summary analysis identifies high rates of usage, as well as high survey response rates for picnicking and athletic fields and well as future interest in dog parks.

- The current usage data from picnic pavilions within both park activity centers (e.g., Lodge and Nature Center) confirm its importance as a continued use at ORP. Not all pavilions are experiencing the same level of usage, and typically the usage rates relate to both location (e.g., ease of access, proximity to desirable amenities) as well as parking availability and size. Neither ESRI BAO nor SFIA have regional or national participation data available for picnic facilities since it is not identified as a recreational activity. The proximity of a pavilion to matching parking capacity and restrooms are the two most important factors to consider in a future master plan. **Continuation of picnic pavilions and re-evaluation of their locations should be considered a high priority for the ORPMP.**
- The softball fields at ORP have been continuously used by Youth and Adult Softball fields for over a decade and historically were also used by other sports leagues. The existing fields play a crucial role in the region's youth softball program. Past evidence of use of the field area by flag football and soccer leagues, as well as the Baltimore County LPPRP indicate a potential need for athletic fields. **Continuation of and potential upgrades to the existing softball fields should be considered a high priority for the master plan. The addition of an athletic field should be considered a medium priority for the ORPMP.**
- The playgrounds at ORP are important assets for the community. The location of the large playground near the Lodge is problematic from a traffic and congestion perspective. **Continuation of playground facilities in a location that reduces risk to cross traffic, should be considered a high priority for the ORPMP.**

- There is not a dog park at ORP. However, the Baltimore County LPPRP North Central Region identified within its higher priorities for amenities desired, dog parks. Additionally, the ESRI MPI indicates approximately nine percent of the population within 30 minutes of the park, own at least one dog. The comparable market identified that there are a limited number of dog parks in the MDA. **The addition of a dog park should be considered a medium priority for the ORPMP.**

Nature/Wildlife Related Recreation Activities - The summary analysis identifies high rates of usage, as well as high survey response rates for activities occurring in and around the ORNC as well as having continued future recreation potential.

- The current Nature Center RPPS data covering both registered and non-registered use confirms the importance of the ORNC within the region. The continued support and stable budget of the Oregon Ridge Nature Center Council are indicators of a program entity that continues to be viable. Neither the Baltimore LPPRP, nor the ESRI BAO provide significant insight to desires for Nature Center programming but do indicate support for outdoor spaces and bird watching. **Continuation of the Nature Center functions, and its existing support facilities and areas are considered a High Priority for the ORPMP.**

Other Recreation/Leisure Activities - For this analysis, this category focuses on the Lodge Facility as well as outdoor events that occur at Oregon Ridge.

- The current usage data from Lodge Facility and whole park events confirm their importance as a continued land use at ORP. The Sequoia Meeting Room occupancy at over 50 percent based upon its operating season is an indicator of strong market demand. This land uses is not considered a traditional recreational use so it does not show up in either the Baltimore County LPPRP nor ESRI BAO. **Consideration of improving the fire safety system and adding air Conditioning to the facility if the current building is retained and ensuring its future use are considered a High Priority for the ORPMP.**

COST BENEFIT ANALYSIS

As part of the research, a market research and cost-benefit analysis for any proposed new, expanded, or rehabilitated facilities that are expected to incur a capital cost of \$1 million or more was undertaken. This analysis was completed for three facilities:

- Lodge (i.e., Lodge replacement, picnic pavilions)
- Concert Shell
- New Nature Center Complex (i.e., Nature Center and picnic pavilions)

MARKET RESEARCH

Market research for the Lodge (i.e., Lodge replacement, picnic pavilions), Concert Shell and the Nature Center Complex (i.e., Nature Center and picnic pavilion) was conducted as part of the initial draft master plan and updated once final decisions on the scope of facilities were identified. Summaries of Competitive Facilities used in the Market Analysis are included in this report. The Market Analysis included primary and secondary market research of competitive/comparable facilities within the market area and an overview on outdoor recreation trends. This analysis included a review of historical ORP Lodge and Nature Center demand trends. It also identified product and pricing for facilities managed by similar entities, specifically, non profits and/or public agencies that would serve clientele that are/or would use the facilities at ORP. The product pricing from the competitive/comparable facilities was analyzed and leveraged in the development of pricing for the proposed facilities within this task.

HISTORICAL AND ESTIMATED FUTURE DEMAND FORECASTS

Existing demand information was assessed for the Lodge and the Nature Center Complexes. The historical data sources reviewed and analyzed for future demand forecasts included:

- Data from FY 2019 (i.e., July 1, 2018, to June 30, 2019) since this was the most recent normal full year of operation in the last four-year period. FY 2020 and FY 2021 were considered COVID-19 pandemic years and FY 2022 was not complete as of the date of the analysis.
- Baltimore County's Recreation and Parks Statistics System (RPSS) data was used to generate Nature Center programming usage. Data on the usage of the Nature Center Pavilions was tabulated by the Nature Center manager and provided in excel.
- The Lodge and picnic data was tabulated based upon scanned copies of permits and licenses issued by the Lodge.

Estimated future demand forecasts were developed based upon a review of historical demand and its relationship to existing facilities size, configuration, suitability, and seasonality of use. For example, the current Oregon Ridge Lodge does not have air conditioning, limiting its use during the peak summer months. Under the estimated demand forecast for the Lodge, year round use is considered with the addition of air conditioning. The Nature Center currently has limited indoor space to accommodate summer camp groups during inclement weather and program space. However, the proposed facility will have additional meeting space allowing for expanded summer camps as well as additional programming opportunities. Finally, the current parking capacity at both the Lodge

and Nature Center cannot accommodate maximum occupancy of all facilities at the same time. The proposed master plan for facilities includes an enhancement of parking to allow for proposed occupancies as well as multiple events occurring simultaneously. Table 16 provides the estimated demand forecasts for the proposed Lodge and Nature Center Complex facilities.

Table 16. Oregon Ridge Estimated Demand Forecasts for Lodge and Nature Complexes	
Lodge Complex and Concert Pavilion Proposed Demand	
Lodge	
Historical Meeting/ Event Demand	121
Proposed Demand	204
Picnic Pavilions	
Historical Pavilion Demand	118
Proposed Demand	169
Whole Park Rentals - Including Concert Shell	
Historical Whole Park Rentals	5
Proposed Whole Park Rentals	7
Nature Center Proposed Demand	
Memberships (Excluding Lifetime)	
Historical Memberships	584
Proposed Memberships	876
Program Services	
Historical Registrations	20,400
Proposed Registrations	30,500
Picnic Shelter Rentals	
Historical Rentals	42
Proposed Rentals	68

Source: Historical data from Oregon Ridge Lodge permits and Oregon Ridge Nature Center Council Memberships and Baltimore County RPSS data FY 18 and FY 19

Estimated Financial Forecasts

Methodology

The estimated financials for each complex (e.g., Lodge Complex, and Nature Center Complex) include both high level estimated revenue and expense forecasts. The high level estimated revenue forecasts are developed based upon the proposed demand build up, Table 16, and application of proposed rate structures, Table 17, for activities envisioned within the proposed new Lodge and Nature Center facilities.

Historical expense data provided by Baltimore County was reviewed and analyzed. The following data was provided and analyzed in the development of the expense budgets:

- Baltimore County Parks and Recreation’s historical budgets for FY 2018 and 2019 for the Oregon Ridge’s Lodge and the Nature Center.
- The 2019 and 2020 Oregon Ridge Nature Council, Inc. IRS 990-EZ tax returns representing years 2018 and 2019.

For analysis purposes, any historical revenue and expense data used in forecasting is represented in FY 2019 value dollars, inflated up to 2023 using the four year (2019 – 2023) average CPI of 4.69 percent.

Estimated Revenue

Estimated demand forecasts provided in Table 16 were multiplied by proposed rates for the new facilities. The rates proposed and illustrated in Table 17 are based upon facilities existing in the competitive market for Lodge and Nature Center Complex activities. The identified facilities located within the City of Baltimore (i.e., Clyburn Arboretum-Vollmer Center and Gardens) as well as Howard County’s Chrysalis at Merriweather Post

Pavilion are comparable with the proposed new facilities. Lodge Complex picnic pavilion rates were structured using the proposed 250 person (PPL) pavilion as an anchor for pricing and recognition that the Arts and Science and Ridge Pavilions would be renovated. For the Lodge Complex, estimated revenue for extra help (i.e., additional staff hours) and grill rentals are based upon historical relationships between this service and number of events multiplied by an average hourly rate for the number of people and event.

For the Nature Center, the pricing position of the Nature Center Pavilions was reviewed against the proposed pricing of the new small and medium pavilions within the Lodge Complex. It was determined that the existing pricing was appropriate. The current Nature Center membership structure was evaluated against other non profit centers in the comparable/competitive set. Based on that review, it is estimated that newly a developed and expanded center will approach the quality and condition of the Irvine Nature Center. As such, an estimated increase in the individual and family membership rates is included in the analysis. Program Revenue includes a variety of activities (e.g., camps, program registrations, special events, etc.); however, there was no historical detail by revenue category for Nature Center Program Revenue. Therefore, future Program Revenue was estimated by inflating the historical per program registration revenue figure from FY 2019 to FY 2023 and applying it to the estimated program registration demand figures. Tables 17 and 18 provide both the historical rates and the proposed rates based upon the comparable/competitive market for both the Lodge and Nature Center Complex at ORP.

Estimated Expenses

The expense forecasts are based upon two separate estimating components. The first expense component applies to operating expense line items. Operating expenses are based upon a 'cost per event'. Meaning if historically there were 'x' events (e.g., picnic or room rentals, registration, etc.), the expense item was divided by the number of events to get a 'cost per event'. For the prospective financial analysis, the historical 'cost per event' line item expense costs were inflated from FY 2019 to FY 2023 and then multiplied by the 'per event' demand forecasts. One area in which expenses were not historically identified was software and systems to provide for efficient booking and management of events and activities at both the Lodge and the Nature Center. The proposed expense forecasts under Contractual Services include an estimate of the resources needed for reservations systems, and marketing and promotional materials. Any reservation system considered includes a cost per reservation that is carried by the consumer.

The second expense component applies to facility expenses including utilities, maintenance, and maintenance reserve expenses. These expenses were developed using industry standards based upon per square foot costs by facility type (e.g., lodge, visitor center/museum, etc.). Since the scope and scale of facilities are expanding significantly, it was determined to not be appropriate to use historical expense ratios for these expense items. Additionally, in most cases, the Baltimore County expense budgets did not appear to include these line items, with the understanding that these expenses may be funded at the central Baltimore County level. The Nature Council 990's did include elements of these items but since they represented a small facility and the elements of these costs were not easily isolated, they were not used. Recognizing that these are new facilities and represent a significant capital investment, it is critical that the facility expense categories are appropriately represented on the prospective financial statements.

Table 17. Oregon Ridge Estimated Rates for Lodge and Nature Complex					
Oregon Ridge Lodge Complex - Lodge Proposed Rates 2023\$			Oregon Ridge Complex - Picnic Pavilion Proposed Rates 2023 \$		
	Current Rates (1)	Proposed Rates		Current Rates (1)	Proposed Rates
New Lodge Room (250 PPL BQT)			New Pavilion (250 PPL)		
Weddings (8 hour rental)			Weddings		
Profit	\$1,500	\$3,500	Profit	\$0	\$1,000
Banquets (4 hour rental)			Company Picnics		
Profit	\$750	\$1,800	Profit	\$0	\$1,000
Non profit			Non profit	\$0	\$850
Meetings (4 hour rental)			Renovated Arts & Science & Ridge Pavilion (150 to 200 PPL)		
Profit	\$400	\$500	Profit	\$350	\$400
Non profit	\$250	\$375	Non profit	\$300	\$340
New Medium Room (125 PPL BQT)			New Pavilion 1 (100 PPL)		
Weddings (8 hour rental)			Profit	\$0	\$400
Profit	\$0	\$2,100	Non profit	\$0	\$340
Banquets (4 hour rental)			New Pavilion 2 (100 PPL)		
Profit	\$0	\$1,050	Profit	\$0	\$400
Non profit	\$0	\$788	Non profit	\$0	\$340
Meetings (4 hour rental)			New Pavilion 3 (100 PPL)		
Profit	\$300	\$400	Profit	\$0	\$400
Non profit	\$225	\$300	Non profit	\$0	\$340
New Small Room (50 PPL BQT)			New Small Pavilion 1 (30 PPL)		
Weddings (8 hour rental)			Profit	\$175	\$200
Profit	\$0	\$1,050	Non profit	\$130	\$170
Banquets (4 hour rental)			New Small Pavilion 2 (30 PPL)		
Profit	\$0	\$525	Profit	\$175	\$200
Non profit	\$0	\$394	Non profit	\$130	\$170
Meetings (4 hour rental)			<i>(1) Current rates represent Friday to Sunday rates. Demand Analysis factors in weekday vs. weekend rates</i>		
Profit	\$100	\$200			
Non profit	\$60	\$150			
<i>(1) Current rates represent Friday to Sunday rates. Demand Analysis factors in weekday vs. weekend rates</i>					

Source: Historical Fees and Charges, Data from Oregon Ridge Lodge Permits and Oregon Ridge Nature Center Council Memberships and Baltimore County RPSS data FY 18 and FY 19

Table 18. Oregon Ridge Estimated Rates for Lodge and Nature Complex					
Oregon Ridge Lodge Complex - Whole Park Rental Rates - 2023 \$			Oregon Ridge Nature Center - Picnic Pavilion and Membership Rates - 2023\$		
Actual Core Event Day Event	Current Rates	Proposed Actual Rates (1)		Current Rates (1)	Proposed Rates
Profit	\$2,000	\$5,300	Picnic Pavilions		
Non profit	\$1,800	\$4,770	Kidd's (75 PPL)		
Set up Day event			Member	\$200	\$200
Profit/Non profit	\$2,000	\$2,000	Non member	\$250	\$250
(1) Whole Park Rate provides for exclusive use of all Lodge rooms, picnic pavilions, and Concert Shell			Lake (75 PPL)		
			Member	\$200	\$200
			Non member	\$250	\$250
			New Pavilion (50 PPL)		
			Member	\$0	\$150
			Non member	\$0	\$200
			Membership Rates		
			Individual / Senior	\$15	\$25
			Family	\$30	\$65
			Supporting	\$75	\$100
			Sustaining	\$250	\$250
			Lifetime	\$500	\$500

Source: Historical Fees and Charges, Data from Oregon Ridge Lodge Permits and Oregon Ridge Nature Center Council Memberships and Baltimore County RPSS data FY 18 and FY 19

Historically, Baltimore County did not carry a ‘maintenance reserve’ for the facilities. A maintenance reserve would represent dedicated resources available to support replacement of core components of the facilities and provide for improved asset stewardship. A maintenance reserve for each facility has been included. These expenses were estimated on a percentage of revenue based upon industry standards by asset types. There is a relatively low prospective revenue for each facility in relation to the significant development costs, meaning that the estimated maintenance reserve amounts will not be enough to recapitalize the assets over their lifecycle. However, the maintenance reserve funds will represent a funding source that can be leveraged against other capital funds when component repairs are needed.

Expense forecasts were developed for the Oregon Ridge Nature Center Complex through a review of historical Baltimore County Parks and Recreation/Nature Center expense trends and the Oregon Ridge Nature Center Council 990's. Currently, the Nature Center is supported by financial resources of both Baltimore County and the Nature Center Council. For financial forecasting, the financials are combined to provide a comprehensive look at the proposed fiscal position of the new operation.

A summary of the estimated financial forecasts for each facility as well as a comparison to their historical financials, is provided in Tables 18 and 19.

As Table 18 indicates, the estimated financial forecast for the Oregon Ridge Lodge Complex results in a Net Loss before Utilities, Maintenance and Maintenance Reserve. However, the resultant figure (e.g., **-\$50,200**) is lower than the historical FY 2019 budget. Additionally, the prospective financials after the utility, maintenance and maintenance reserve expenses results in a net loss which is 34% greater than the FY 2019 net loss prior to these line items being added.

As Table 20 indicates, the estimated financial forecast for the ORNC complex results in a Net Loss before Utilities, Maintenance, and Maintenance Reserve. The resultant figure as a percentage of revenue is lower (e.g., **-141%** vs. **178%**) than the historical combined financials. However, the resultant dollar figure (e.g., **-\$305,400**) is 41 percent higher than historical combined FY 2019 budget. Additionally, the prospective financials after the utility, maintenance and maintenance reserve expenses results in a net loss which is approximately 2.3 times higher than the existing Oregon Ridge Nature Center combined financials.

Table 19. Oregon Ridge Lodge Complex Prospective Financials

Historical FY 2019\$ Budget	%	Revenue	2023\$	%
		Lodge Rental	\$177,000.00	45%
		Extra Help - Lodge Rooms	\$2,000.00	1%
		Picnic Pavilion	\$84,000.00	21%
		Extra Help - Picnic Pavilion	\$27,000.00	7%
		Grill Rental	\$2,900.00	1%
		Whole Park Rental	\$101,000.00	26%
\$78,115		Oregon Ridge Lodge Revenue	\$393,900.00	100%
		Operating Expenses		
\$206,971	265%	01 Personal Services	\$382,000.00	97%
\$100	0%	02 Travel	\$200.00	0%
\$3,222	4%	03 Contracted Services	\$28,100.00	7%
\$702	1%	04 Rents and Utilities	\$1,400.00	0%
\$14,250	18%	05 Supplies and Materials	\$31,000.00	8%
\$-	0%	06 Equipment Maintenance	-	0%
\$-	0%	07 Grants	-	0%
\$700	1%	08 Other Charges	\$1,400.00	0%
\$-	0%	09 Land, Buildings, Other Improvements	-	0%
\$225,945	289%	Oregon Ridge Lodge Operating Expenses	\$441,100.00	113%
\$(147,830)	-189%	Net Income/ Loss Before Facility Expenses	\$ (50,200.00)	-13%
		Utilities	\$33,000.00	8%
		Building Operational Maintenance	\$58,000.00	15%
		Building Preventative and Repair and Maintenance Reserve	\$44,000.00	11%
		Maintenance Reserve	\$12,000.00	3%
		Net Income/ Loss After Facility Expenses	\$(197,200.00)	-50%

Note:

(1) Line items highlighted in green, bold, and italicized are expenses that have not been traditionally carried on the Oregon Ridge Lodge financial. As this table indicates, the estimated financial forecast for the Oregon Ridge Lodge Complex results in a Net Loss before Utilities, Maintenance and Maintenance Reserve. However, the resultant figure (e.g., -\$50,200) is lower than the historical FY 2019 budget. Additionally, the prospective financials after the utility, maintenance and maintenance reserve expenses results in a net loss which is 34 percent greater than the FY 2019 net loss prior to these line items being added.

Table 20 Oregon Ridge Nature Center Estimated Financial Forecast				
Historical FY 2019\$ Budget	%	Revenue	2023\$	%
\$42,106	35%	990 1 Contributions and Grants	\$44,000	20%
\$64,983	53%	990 2 Program Service Revenue (1)		55%
	0%	Picnic Pavilion	\$14,000	
	0%	Camps, Events, and other registration	\$105,000	
\$14,533	12%	990 3 Membership Dues and Assessment	\$54,000	25%
\$121,622	100%	Oregon Ridge Nature Center Revenue	\$217,000	100%
		Operating Expenses		
\$238,944	196%	01 Personal Services	\$382,000.00	176%
\$35	0%	990 E16c Staff Expenses	\$900.00	0%
\$1,000	1%	02 Travel	\$2,000	1%
\$2,105	2%	03 Contractual Services	\$30,000	14%
\$2,225	2%	990-E13 Professional Fees	\$3,000	1%
\$9,581	8%	04 Rents and Utilities	\$0	0%
\$4,427-	4%	990-E14 Occupancy Rent Utilities and Maintenance	\$0	0%
\$8,860	7%	05 Supplies and Materials	-	0%
\$43,998	36%	990 E1 6a Programs and Course Expenses	\$45,000	21%
\$2,612-	2%	990 E1 6b Committee Expense	\$5,000	2%
\$616	1%	990 E16g Office Expense	\$500	0%
\$2,588	2%	990 E1 6h Earmarked Donations	\$5,000	2%
-	0%	06 Equipment Maintenance	\$0	0%
\$503	0%	990 E1 6f Repairs and Maintenance	\$1,000	0%
-	0%	07 Grants	\$0	0%
\$16,000-	13%	990 E10 Grants and Similar Amounts Paid (scholarships)	\$19,000	9%
-	0%	08 Other Charges	\$0	0%
\$50	0%	990 E1 6i Insurance	\$1,000	0%
-	0%	09 Land, Buildings, Other Improvements	\$19,000	9%
4,972	4%	990 E16d Equipment Expenses	\$9,000	4%
\$338,516	278%	Total Operating Expense	\$522,400	241%
\$(216,894)	-178%	Net Income/ Loss Before Facility Expenses	\$ (305,400)	-141%
		Utilities	\$46,000	21%
		Building Operational Maintenance	\$19,000	9%
		Building Preventative and Repair and Maintenance	\$129,825	60%
		Maintenance Reserve	\$6,500	3%
		Net Income/ Loss After Facility Expenses	\$(500,225)	-231%

Notes:
 (1)Program Service Revenue includes both picnic pavilion and camps, events and other registrations. Historically, this figure was not broken out on the Nature Center Council's 990, hence the detail on the forecast.

(2)Line items with a 990 are those taken from the standard IRS 990-EZ form.

(3)Line items in green, bold, and italicized are replacing the historical Oregon Ridge Nature Center Council estimates for utilities and maintenance. The expense lines 04 and 990-E14 have been zeroed out and replaced with the industry benchmarks for utilities, maintenance, and reserve. A maintenance reserve has not traditionally been carried on the Oregon Ridge Nature Center Council 990.

COST BENEFIT ANALYSIS

Cost Benefit Analysis for the purposes of this document has been defined to include both fiscal and non-fiscal impacts. Since the parcels are in public ownership, they do not generate any property tax revenue; therefore, there are no direct fiscal impacts. The non-fiscal impacts are categorized into three areas: Social Equity, Environmental Health, and Economic Prosperity. Details on Economic Prosperity are represented in aggregate in Table 21, but the sum of their impacts (e.g., additional staff costs, contracts for services, etc.) are represented in the financials presented in the prior section. Table 21 provides an overview of both the positive and negative Social Equity, Environmental Health, and Economic Prosperity Impacts for the proposed facilities.

CONCLUSION

The proposed Lodge, Concert Shell, and Nature Center scope of facilities result in an increased opportunity to accommodate social benefits in the form of expanded community demand and resultant increases in financial revenue for each facility. The social and environmental benefits can potentially be increased because of this increase in demand. The Economic Prosperity results indicate that these benefits will come at an increase in costs to Baltimore County. As the prospective financials indicate, the operational and facility expenses/costs cannot be offset by the resultant revenue.

Table 21: Cost Benefit Analysis - Oregon Ridge Master Plan Lodge Complex, Concert Pavilion and Nature Center

Investment	Description	Social Equity	Environmental Health	Economic Prosperity
Oregon Ridge Lodge Elements				
<i>New Oregon Ridge Lodge Facility</i>	New Multi Meeting Space Lodge Facility of approximately 17,000 square feet.	Expanded access for community events through additional improved meeting spaces. Improved opportunities for social gatherings improving mental and physical health of the community. (e.g., Weddings, Showers, Birthdays, Retirements, etc).	Increase in energy and material use during construction. Improved building energy efficiency with new green design, construction and materials.	Creation of additional full time and part time employment opportunities due to increased demand. Increased revenue from new demand for both Lodge, and Picnic Facilities Increased costs for facility stewardship (e.g. utilities & operational maintenance) Increased costs for additional staff to support programs and services.
<i>New Oregon Ridge Lodge Event Pavilion</i>	New Lodge Event Pavilion accommodating 250.	Expanded access for community events through the addition of new pavilions. Improved opportunities for social gatherings improving mental and physical health of the community. (e.g., Family Gatherings, Corporate Picnics, Birthdays, etc).	Venue space for events providing enhanced air quality.	
<i>New Oregon Ridge Lodge (3) Picnic Pavilions</i>	Three New Picnic Pavilions accommodating 100 each.			
<i>New Oregon Ridge Lodge (1) Small Pavilion</i>	New Small Pavilion Replacing Westinghouse but in New Location.	Additional opportunities for small family gatherings and community networking (e.g. Mom/Dad Groups, Fitness, Children Birthday Parties) improving mental and physical well being of community.		
Concert Pavilion	New Concert Pavilion with 4,000 Square Foot Stage.	Additional opportunities to provide cultural events to local and regional community.	Availability of Outdoor Venue Space for cultural events providing enhanced air quality.	Increased revenue from new demand for Concert Stage. Increased Costs for facility stewardship (e.g. utilities & operational maintenance).
Oregon Ridge Nature Center Elements				
<i>New Nature Center</i>	New Multi Faceted Nature Center of approximately 27,000 square feet.	Enhanced opportunities foreducation, community gathering and family Connections through expansive exhibit and meeting space. Enhanced opportunities for improving the community's mental and physical well being through expanded individual, group and family nature experiences/gathering.	Increase in energy and material use during construction. Improved building energy efficiency with new green design, construction and materials.	Creation of additional full time and part time employment opportunities due to increased demand. Increased revenue from new demand for family memberships, programs and picnic Increased costs for facility stewardship (e.g. utilities & operational maintenance) Increased costs for additional staff to support programs and services.
<i>New Nature Center Small Pavilion</i>	Replacement of Woodland Pavilion with New Pavilion near new Playground.	Enhanced opportunities for small family gatherings and community networking (e.g. Mom/Dad Groups, Fitness, Children Birthday Parties) improving social well being of community.		

ASSUMPTIONS AND LIMITING CONDITIONS

Lardner/Klein was engaged by Baltimore County (Client) and CHMGS (we) was retained by Lardner/Klein to conduct the referenced analysis.

The services do not include the provision of legal advice and we make no representation regarding questions of legal interpretation. Client should consult with its attorneys with respect to any legal matters or items that require legal interpretation, under federal, state, or other type of law or regulation, changes in law or in regulations and /or their interpretation that may have taken place after the date that our engagement commenced or may be retrospective in impact. We accept no responsibility for changes in law or regulations or their interpretation which may have occurred after the effective date of our engagement.

Client has provided us information relevant to the services; to properly perform the service, client may require any reasonable. Client represents and warrants to us that all such information is accurate and complete in all material respects. The overall definition and scope of the work performed, and its adequacy in addressing Client's needs, is Client's responsibility. Client acknowledges that we did not perform any management functions or make any management decisions in connection with the services. Client is also responsible for the implementation of actions identified during this engagement and results achieved from using and Services or Deliverables.

To the best of our knowledge and belief, the statements of fact contained in this report, upon which the analysis and conclusion(s) expressed are based, are true and correct. In the preparation of this analysis and the report, we have relied on information, estimates, and opinions furnished to us by third-party sources (source information). We make no warranty or representation as to the accuracy of the source information or any information set forth in our report that is based , in whole or part, on the source information.

Our analyses are based on estimates and assumptions developed in connection with the contract to provide these services. Some assumptions, however, inevitably will not materialize, and unanticipated events and circumstances will occur; therefore, actual findings and results achieved during the period covered by the accompanying analyses will vary from the estimates contained therein and the variations may be material.

Unless otherwise stated, there was no effort exerted to determine the possible effect, if any, on the estimates contained herein from future federal, state, or local legislation, including any environmental or ecological matters or interpretations thereof.

The analysis contained herein is based on a point-in-time of the market for real estate as well as visitor service activities in and around ORP. We take no responsibility for any events, conditions or circumstances that may affect the subject facilities that take place after the delivery of this report but recognize that certain events may occur between that time and delivery of the scenario analysis and franchise fee analysis report. The estimates and underlying analyses presented herein are time sensitive, as changing market conditions inevitably will require CHMGS update this analysis. We believe that the observations and recommendations expressed in this report will remain valid for a period of one year beyond the issue date of this report. After that date, the information contained herein is likely not reliable and must be updated to remain valid. (Report dated January 27, 2023)