

The Aspen Historic Park and Recreation District Service Plan

The Aspen Historical Society is partially funded by a special district approved by the voters in 2006. The Aspen Historic Park and Recreation District has the same boundaries as the Aspen School District. All property owners within this district are levied 3/10ths of a mill annually to support the Historical Society. This funding is spent, according to the Service Plan herein attached, to ensure the physical integrity of our five sites and to support our educational programming. For further information, please refer to the Winter 06-07 and the Winter 2008 newsletters which include an annual report.

Aspen Historic Parks and Recreation District Service Plan March 25, 2005

I. Introduction

1. Summary

This Service Plan is presented in support of the formation of a Parks and Recreation District pursuant to the Colorado Special District Act. CRS 32-1-101 et.seq. The District shall be named the Aspen Historic Parks and Recreation District (“District”). The purpose of the District is to provide funding to maintain the properties, programs and assets of the Aspen Historical Society (AHS). Those properties include, but are not limited to, the following: The Wheeler/Stallard House Museum, the Holden/Marolt Mining and Ranching Museum, the Willoughby Park/Lift One Historic Site and the Ashcroft Ghost Town and Independence Ghost Town. These properties are both owned and leased by the Historical Society as detailed in Section II,3.a., below. The District will enter into a contract with AHS to provide AHS with funding in consideration of the ongoing management and maintenance of these facilities and associated projects managed by AHS. The District will fund maintenance of those assets and improvements within the limitations of the District’s funding. The District will also fund the staff necessary to maintain those assets and to make them available and useful to the public. In addition, the District shall have all of the powers of a parks and recreation district as described in CRS 32-1-101 et.seq.

The District shall enter into an Agreement with AHS whereby the District would provide funding and oversight while AHS will continue to provide the specific services described herein with existing staff and other resources. While this Agreement will provide for an on-going relationship and permanent relationship between the District and AHS, it will be subject to annual funding commitments from the District. The District will provide stable funding sufficient to support basic AHS services, as defined herein. The District will also provide financial oversight and accountability mechanisms to assure that District funds are used appropriately. The relationship between the District and AHS will require that AHS demonstrate how it is fulfilling the requirements of this Service Plan in a way that is predictable, public and ongoing. District funding will normalize operations and allow AHS activities at professional levels.

The proposed Aspen Historic Parks and Recreation District is located in Pitkin County and includes the City of Aspen, the Town of Snowmass Village, and unincorporated parts of Pitkin County between Independence Pass and Watson Divide. A map of the proposed District boundary is attached. The boundaries are coincident with, and identical to, the boundaries of the Aspen School District.

The District is proposed as a means of funding the activities and maintaining the assets of the Aspen Historical Society. This proposal is aimed at meeting several significant needs, including:

- Providing a stable funding base that will assure that AHS continues to have access to a baseline funding level that will maintain and preserve its current assets and programs.
- Assurance that minimum standards of asset and property maintenance will be met.
- Assurance that the Historical Society’s archives, artifacts, records and collection will be properly stored and cared for in accordance with applicable industry standards.

- Assurance that properties and facilities will continue to be available to the public and adequately staffed.
- Fiscal and management oversight that will assure that AHS resources are used responsibly and in a way that can be justified to the taxpayers
- Accountability and openness are requirements of governmental agencies such as Special Districts. Meeting these requirements will provide opportunities for the District and AHS to review, evaluate, adjust and justify their budgeting and asset management policies.

The provision of these services will benefit the current and future residents of the District as follows:

- Important and irreplaceable community facilities and assets will be maintained by AHS in a professional and predictable manner to assure their preservation into the distant future.
- AHS will maintain appropriate staff levels to provide program, maintenance and management activities.
- The District will be eligible for Colorado Trust Fund distributions in addition to other sources of funding.
- AHS programs and activities, including classes, interpretive services and other community outreach and educational activities will be continued. These community interaction activities are important to educate the Town’s residents and visitors about the history and heritage of the Aspen area.
- The District will be eligible for lower interest rates should it need to borrow money for any purpose in the future subject to need and District Board direction.
- The District will collect operating and debt service revenues in the form of property taxes, which will be deductible for property owners within the District, thereby providing tax benefits.
- The District’s activities will fall under the protection of the Colorado Governmental Immunity Act, thereby reducing the liability exposure and insurance costs that would otherwise fall to the Historical Society.
- The District will provide comprehensive, professional, thorough and predictable financial management of the revenues collected by the District according to statutory accounting and bookkeeping standards.
- AHS will have the stable funding base necessary to provide historical preservation and programming resources to other entities in the Roaring Fork Valley with similar interests.

2. Organization

a.) Statutory Requirements

CRS 32-1-101, et seq., provides that proposed Parks and Recreation Districts must submit a Service Plan to the County in which they are to be organized. The County Commissioners may approve the Service Plan if it demonstrates the following:

- There is sufficient and future need for the services to be provided by the District.
- Existing services within the proposed District are inadequate for future needs.
- The proposed District is capable of providing services efficiently and effectively.
- The District has the financial capability to provide services.
- The District Service Plan is consistent with adopted state or local Master Plans relating to land use, water quantity, water quality, or other relevant elements of the Service Plan.

b.) Organizing Committee Members

The Organizing Committee is the Board of Trustees of the Aspen Historical Society as follows:
Jackie Kasabach, President

Dwayne Romero – Vice President
Ken Hammerle - Treasurer
Judy Bleiler - Secretary
Jim Moran
Carl Bergman
Gail Nichols
Jenna Weatherred
Mary Anne Meyer
Nick Coates
Mary Eshbaugh Hayes
Peter Helburn
Vince Lahey
Lee Mulcahy

c.) District Counsel

Robert M. Noone, Esq,
The Noone Law Firm
1001 Grand Avenue, Suite 207
Glenwood Springs, CO 81601

d.) Planning Consultant

Mark Fuller
Fuller Consulting Services
0238 Fawn Drive
Carbondale, CO 81623

II. Service Plan

1. Background

The Aspen Historical Society was founded in 1963 by a group of Aspen citizens who were concerned about the loss of historic buildings, artifacts and resources resulting from the transition of the town from a sleepy mining village into a modern ski resort. The Society's purpose was, and is, to collect, preserve, restore and display the memorabilia of a hundred plus years of the history of Aspen and the upper Roaring Fork Valley and to educate the public regarding that history. Organized as a 501(c)(3) non-profit, the Society has relied largely on local volunteers to carry out this mission.

In 1964-66, the Society organized and displayed historic artifacts in the Wheeler Opera House and the Aspen City Hall, and in 1968 the Society leased the Wheeler\Stallard House from the Aspen Institute. The house opened as a museum in January, 1969, and later that year the Society succeeded in raising sufficient funds to buy the house outright. The Wheeler\Stallard Museum, located at 620 West Bleeker Street in Aspen, has been the Society's headquarters and most important facility since then. In 1974, the Society was granted a permit to manage the Ashcroft Ghost Town located on National Forest property at the head of the Castle Creek Valley. The Historical Society was the first private non-profit to be granted a management permit for a National Historic Property located wholly within a National Forest. In 1982 the Society was granted a similar permit for management of the Independence Ghost Town on Independence Pass.

In 1976, the Society raised \$24,000 to build the Wheeler\Stallard Carriage House to provide storage and archive space. In 1989, the Society was granted a 75-year lease on the Holden\Marolt Barn site just west of Castle Creek with a 76% approval vote. The barn was restored and opened in 2003 as a mining and ranching museum. In 1991, the Society added to its facilities with another long-term lease from the City of Aspen for Willoughby Park, the original Lift One loading station at the base of Aspen Mountain. This time the approval percentage from the electorate was 81%.

Currently all Aspen Historical Society facilities and sites are open to the public in the summer months, and the Wheeler\Stallard Museum is open year-round. It is anticipated that the Holden\Marolt Museum will also be open year-round in the near future. Various programs, activities and projects are also carried out on a year-round basis. Further details regarding the Society's facilities and programs are provided in Section II, below.

In 2002, the Historical Society encountered economic difficulties due to a number of factors. Among the factors contributing to the crisis were overexpansion of facilities and staff, drop-off in contributions, as long-time supporters left the valley, and several capital improvement and repair projects that were outside the normal budget. In addition, the Society's volunteer base was severely eroded by down-valley migration and lack of success in recruiting volunteers from new residents. The Society was threatened with severe cutbacks in programs and facilities or with complete collapse. In 2004, after struggling to address its economic problems and enduring significant staff and Board turnover, the Society approached the City of Aspen and Pitkin County for assistance and was granted a one-time contribution of \$276,000, sufficient to meet Historical Society bare minimum needs for one year. This contribution was conditional on the Society working in 2005 to establish a permanent and secure funding base that would allow it to continue to function at its normal level. After researching several alternative strategies, the Society determined, in late 2004, to pursue establishment of a Special District that would provide a means for the community to fund AHS operations through a property tax. There are several types of Special Districts, but the Parks and Recreation District is the only one that includes historic and cultural facilities preservation and management within its authorized scope of activities. As noted elsewhere in this Service Plan, it is the intention of the proposed District to support historic preservation, maintenance and program activities only, and not to pursue other park and recreation-related activities. In light of the District's intent and purpose of supporting the activities of AHS, this Service Plan is aimed at characterizing those activities and illustrating how the District's funding will match the needs of AHS.

2. Location

As noted above, the Aspen Historical Society headquarters is located at the Wheeler/Stallard Museum, 620 West Bleeker, Aspen, Colorado 81611. Other AHS facilities are located at various places around Aspen and the upper Roaring Fork Valley. Appendices I & II, below, include maps showing the locations of the Society's various facilities. It is anticipated that the Society will provide office space and staff to the proposed District, so District offices will also be located at the Wheeler/Stallard Museum.

3. Need for Service

There is no other entity in the upper Roaring Fork Valley that provides services comparable to those provided by the Aspen Historical Society. The U.S. Forest Service and the City of Aspen have demonstrated their dependence on AHS for these services by way of their permitting and leasing, respectively, various facilities to AHS for management. The local schools and colleges (i.e. Colorado

Mountain College) do not provide historic preservation or programming services nor do other local non-profit organizations. Local schools currently depend on AHS to provide educational programming on local history. Local cultural organizations, such as the Wheeler Associates, the Music Associates of Aspen, and the Aspen Institute do not provide historic preservation services. Although the proposed District would overlap or be contiguous with several Special Districts, none of these Districts includes historic preservation or historically-oriented recreation within its service plan. There is no other Parks and Recreation District in the upper valley. The City of Aspen currently provides general recreational facilities and services such as playing fields, golf course, swimming pool and various traditional recreational and sports-oriented programs. The Parks and Recreation District proposed herein does not intend to provide any recreational services or activities beyond those currently provided by the Aspen Historical Society, so there would be no actual redundancy between the activities described in this Service Plan and those provided by the City of Aspen. It is safe to say that the services and facilities currently provided by AHS would be lost to the public should AHS cease to exist. Since 2004, AHS has been funded by their usual private contributions and by a one-time contribution of \$276,000 from Pitkin County and the City of Aspen. This contribution was granted on the condition that AHS establish a permanent and dependable source of funding and this District Service Plan is a response to that requirement.

a. Historic Facilities

AHS currently owns, leases or manages under permit the following facilities:

1. Wheeler/Stallard Museum, Carriage House and Grounds, 620 West Bleeker Street, City of Aspen. This facility consists of a fully-restored 1888 Victorian mansion that currently houses historic artifacts, exhibits, and the AHS offices. The Carriage House houses more than 6,000 artifacts, 13,000 historic photographs and 3,500 other archival papers. The Wheeler/Stallard grounds consist of nearly an entire city block including a lush garden that is available for public events and gatherings.
2. Holden/Marolt Museum, 40180 Highway 82. This property includes 1.9 acres of grounds located on the Marolt Open Space that was originally part of the Lixiviation Works (ore processing facility) that was built on the site in 1891. The barn was later converted for ranching by the Marolt family after the Lixiviation Works were closed in 1904. The barn has been restored and now houses mining and ranching artifacts from the area and a model of the site from the 1890's.
3. Willoughby Park, 700 South Aspen Street, Aspen. The site includes the Lift One Loading Station, the site of Aspen's first chairlift on Aspen Mountain. Willoughby Park has been discussed as the possible site for a future ski museum. Currently, the existing building on site is used to store portions of the AHS collection.
4. Ashcroft Ghost Town, located 11 miles south of Aspen on Castle Creek Road. Ashcroft is a restored and preserved ghost town located on a site of approximately 9 acres just adjacent to the Castle Creek Road and wholly within the White River National Forest. Ashcroft was one of the first settlements in the Roaring Fork Valley and once had a population of 2,000. AHS has managed the site under a permit from the US Forest Service since 1974. AHS offers guided tours of the property in cooperation with the Aspen Center for Environmental Studies during the summer months. An extensive archeological survey to establish the true boundaries of the town is currently underway, supported by a grant from the Colorado Historical Society.

5. Independence Ghost Town, located 13.5 miles east of Aspen on Highway 82. The Town of Independence was founded in 1879 and had a year-round population of miners and merchants until 1899. AHS has managed this site under a Forest Service Permit since 1982. Self-guided tours of this site are available.

All of the above sites are on the National and Colorado Registers of Historic Properties, and the Wheeler/Stallard Museum, Holden/Marolt Barn and Lift One Loading Station are on the City of Aspen's Inventory of Historic Sites and Structures.

b. Programs, Activities and Projects

AHS carries out a number of ongoing activities that are aimed at preserving local history, fostering a sense of appreciation for local history, and providing the public an opportunity to interact with local historic resources. These activities include the following:

- **Wheeler/Stallard House Tours.** The Wheeler/Stallard Museum is the site of the Historical Society's permanent exhibits plus various revolving exhibits. Tours of the House are available five days per week all year. A fee of \$6.00 per adult or \$3.00 for children 12 and under is charged. (NOTE: \$5.00 for seniors)
- **School Tours.** AHS offers tours and stories of local history to local third and fourth grade school classes, which include local history as part of their standard curriculum.
- **Holden/Marolt Tours:** The Holden/Marolt Mining & Ranching Museum offers tours of mining and ranching artifacts five days per week on a seasonal basis. There is a fee of \$6.00 for adults and \$3.00 for children 12 and under.
- **West End Walking Tours.** Trained volunteer guides lead visitors through Aspen's historic West End neighborhood to learn about local history, landmark buildings, and Victorian architecture. These tours are offered during the summer months. There is a charge of \$10 per person or \$250 for private group tours.
- **Ghost Town Tours.** AHS offers tours of Ashcroft during the summer months at a cost of \$3.00 per person. Self-guided tours of Independence Ghost Town are also available seasonally.
- **Trunk Shows.** AHS provides specialized collections of mining, native American and ranching artifacts for educational purposes. Each "trunk" includes lesson plans, worksheets, handouts and customized curricula. These trunks are available for classrooms and private groups upon request.
- **Grounds Rental.** The Wheeler/Stallard Museum grounds and the Holden/Marolt grounds are made available for special events such as parties, weddings and benefits. These facilities can accommodate up to 250 people and can be rented during the summer and early fall months with the cost variable depending on the size of the event.
- **Slide Shows.** AHS makes slide shows and presenters available on a variety of topics, including Aspen history, mining, ski history and Ashcroft Ghost Town. Slide shows are available for \$200 on weekdays and \$300 on weekends.

- **Other Events and Activities.** AHS puts on other social and educational events annually, which are intended to inform or engage residents and visitors. These events include:
 - > Old Timers Party
 - > Lectures, Classes, Workshops and Seminars
 - > Fundraising Events with Historical Themes
 - > Annual Celebrate History Week
 - > Holiday Community Events at the Museums

- **Scholarly and Archival Activities:** AHS carries out the following activities in connection with maintenance of archives, providing access to archives, and maintaining contacts with other organizations with similar or supporting missions:
 - > Coordination with other Historic organizations, local and national
 - > Scholarly research services
 - > Historic resource inquiries
 - > Visitor Services

4. Population Trends

The current population within the proposed District boundaries is approximately 8,342. Population trends within the District boundaries indicate a growth rate of approximately 2.4 % per year (source: Colorado Dept. of Local Affairs/State Demographer’s Office). Assuming that this growth rate continues, District population can be expected to grow to 9,392 in five years and 10,572 in ten years.

5. District Organization

The District will be organized according to the provisions of Title 32, Article 1, Colorado Revised Statutes, and any other applicable laws and regulations. The District will be managed by a five-person board of directors who will be elected at large according to applicable statutes and regulations. A slate of directors will be proposed for inclusion on the ballot that will also be the venue for District Organization. It is anticipated that the candidates for directors of the District will also be members of, or affiliated with, the Aspen Historical Society, thus assuring a strong affinity between the District and AHS. The Board will exercise all powers and authority granted to the District by the law and will conduct its operations in accordance with statutory requirements.

III. Intergovernmental relations

The District will coordinate its activities and operations with those of the City of Aspen, the U.S. Forest Service, Pitkin County and other government agencies and jurisdictions to the extent that such coordination will be necessary in order to carry out the District’s obligation, be mutually beneficial, or be required by applicable statutes or regulations. The District will make a special effort to coordinate with the City of Aspen and the Town of Snowmass Village to assure that District activities, programs and facilities do not conflict with, or duplicate the recreational activities and facilities provided by the City. The District boundaries overlap with those of other Special Districts, including the Aspen School District, the Aspen Volunteer Fire District, the Colorado River Water Conservation District and several other Districts with specific and non-conflicting purposes. The District will obtain all necessary land use and building permits from Pitkin County prior to undertaking any projects or construction. The District will coordinate annually with the County Assessor and County Clerk to assure that property taxes are collected and delivered to the District according to established procedures.

IV. Facilities and Programs

A. General Responsibilities

The District will enter into a contract with AHS requiring that AHS carry out the following general responsibilities:

- Maintain all current facilities of the Aspen Historical Society and upgrade or improve those facilities when necessary and when funding allows.
- Maintain all current programs, projects and activities of the Aspen Historical Society and expand or improve those programs, etc. when necessary and when funding allows.
- Provide public services in the form of access to, use of, and interaction with the Society's resources, including but not limited to, physical facilities, historic records and archives, exhibits, displays, artifacts and activities.
- AHS will work towards accreditation under appropriate state and federal guidelines. Such accreditation will improve AHS' credibility and fundraising opportunities.

B. Facilities

The District will not own any facilities in its own name. AHS will continue to own and maintain the facilities and properties described above. Those facilities may be changed, expanded or improved in keeping with AHS strategic plans, projects or activities. Any new facilities will be reviewed and approved in keeping with applicable codes and regulations. AHS will coordinate all activities, projects and programs with the District to assure compliance with this Service Plan.

C. Financial Summary

This section describes the general nature, basis and method of funding, and debt and mill levy limitations associated with the District's activities.

1. Debt Limitation

This Service Plan does not propose to issue debt at this time. If the District determines that borrowing is necessary in the future, that debt issuance will be subject of an amendment to this Service Plan and an election to authorize that borrowing. Therefore no debt limit is proposed at this time.

2. Debt Issuance

As noted above, there is no debt issuance proposed at this time.

3. District Revenue

The mill levy to support operating expenses is expected to be .30 mills per property. It is anticipated that this mill levy will generate approximately \$487,489.00 as of the first year of collection. It is anticipated that this amount will rise as development and assessed valuation increases in future years.

4. Security for Debt

No debt issuance is proposed at this time

5. Revenue Projections

The 2004 assessed valuation of the property within the District is estimated to be \$1,624,557,325. A mill levy of .30 mills on this property would raise \$487,489 in the first year of collection. Typical income from other sources, including grants, sales of merchandise, admission fees, conservation trust fund distributions, and contributions, total approximately \$273,000/year. Thus total District income in the first year of collection would be approximately \$753,000

6. Demographic and Valuation Data

Population – Minimum 8,342, Maximum 9,000
Assessed Value as of 2004 - \$1,624,557,325

7. Bonding Costs

N/A

8. Capital and Maintenance Costs

District Maintenance Costs are as follows:

Wages and Benefits	- \$385,622
Insurance	- \$ 23,999
Utilities	- \$ 16,400
Fundraising	- \$ 13,493
General Maintenance & Equipment	- \$ 34,922
Office, Travel & Public Relations	- \$ 28,515
Professional Services	- \$ 21,115
Other	- \$ 92,414
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TOTAL	- \$616,480

In addition to the expenses noted above, AHS will be obligated to repay local government or other entities for operating expenses during the first year of District operation prior to tax revenue availability. The difference of approximately \$136,520 between the anticipated District revenue and expenditures is reserved for this repayment.

9. Impact per household

Actual property value of \$200,000 = assessed value of \$15,917.60 = \$4.77 additional taxes/year
Actual property value of \$500,000 = \$11.93 additional taxes/year
Actual property value of \$1,000,000 = \$23.87 additional taxes/year
Actual property value of \$2,500,000 = \$59.69 additional taxes/year

10. Expenditures

District expenditures will generally conform to those categories noted above.

VIII. Annual Report

Upon request, the District will submit an Annual Report to local governments within one hundred and twenty (120) days from the conclusion of the District's fiscal year, which will coincide with the calendar year. The Annual Report may include some or all of the following information:

- a. Boundary changes made or proposed
- b. Intergovernmental Agreements concluded or pending
- c. Changes or pending changes in District policies
- d. Changes or pending changes in District operations, responsibilities and activities
- e. Status of District staffing and operating costs
- f. Status of construction or planning projects underway
- g. Significant changes in District finances, including a summary balance sheet
- h. Status of any litigation involving the District
- i. General plans for the upcoming year
- j. Current assessed valuation in the District
- k. Status of District Board members including term, attendance at Board meetings, voting records and Board member comments on District operations.
- l. Records of District facility usage, water usage, traffic counts, population, and other indicators of activity within the District.
- m. Other matters of interest or concern including public input and environmental issues.

IX. Modification of Service Plan

The District will obtain the approval of the counties within the District before making any material modifications to this Service Plan. Material modifications include changes to the basic or essential nature of the District including, but not limited to, changes to the services or programs undertaken by the District, planned dissolution of the District, changes in debt limits, changes in revenue sources, or increases or reductions in the land area under District responsibility. County approval will not be sought, and is not necessary, to modify the terms of financing instruments or to change the methods and procedures for carrying out services and activities included in this Service Plan.

X. Disclosure

The Organizers and the District will take steps to ensure that the developers of property located within the District provide written notice upon closing to purchasers of land regarding the existence of taxes imposed by the District. The District will record a statement against the property within the District at such time as the property is legally included therein, giving notice to the existence of the District.

XI. Board of Directors

The Organizers propose the following qualified electors of the District to serve as the Board of Directors of the District upon election and approval of the District:

Name	Proposed Term
XXXX	4 years
XXXX	4 years
XXXX	2 years

XXXX 2 years

XXXX 2 years

All Directors will be elected At Large, although the District will attempt to encourage representation from the different neighborhoods within the District.

XII. Appendix

Appendix I – AHS In-Town Facilities Map

Appendix II – AHS Rural Pitkin County Facilities Map

Appendix III – Proposed District Boundaries Map

Appendix IV – AHS Program Information

Appendix V – AHS Budget Information

Addendum
To the
Aspen Historic Park and Recreation District Service Plan
June 3, 2005

The Following Additions are made to the above-referenced Service Plan:

1. **Future Additional Services or District:** There is a possibility that amendment(s) to this Service Plan may be proposed in the future to allow for the provision of traditional park and recreational services by this District. Should that occur, the amended Service Plan will be resubmitted for review and approval by Pitkin County. Alternatively, the Aspen Historical Society will not oppose the formation of a separate Park and Recreation District should one be proposed in the future for the purpose of providing traditional park and recreation services and facilities.
2. **GOCO Funding:** The Aspen Historic Park and Recreation District will not accept an annual allocation from the Great Outdoors Colorado Trust Fund and will request that any allocation assigned to them go instead to the City of Aspen.
3. **Bridge Loan:** This Service Plan will be further amended to include the details of any debt assumption by the Aspen Historical Society or by the Aspen Historic Park and Recreation District in connection with providing operational funding for the District between the time that the District is formed and the receipt of tax revenues, as soon as those details are available. Any such debt will also be authorized by appropriate language to be submitted to voters.
4. **Agricultural Lands:** To account for the exemption of property which are zoned and assessed for agricultural use and which are over 40 acres in size, the Service Plan is amended as follows:

On Page 8-9, # 5, under “Revenue Projections”, the “assessed valuation of the property within the District is estimated to be \$1,624,557,325” is amended to substitute the value of \$1,622,444,375.

On Page 9, #6, under “Demographic and Valuation Data”, the “Assessed Value as of 2004” is amended to substitute the value of \$1,622,444,375.

On Page 8-9, #5, under “Revenue Projections”, “A mill levy of .30 mills on this property would raise \$487,489 in the first year of collection.” is amended to substitute the value of \$486,854.