



Market & Feasibility Advisors

FINAL REPORT

Economic Impacts of the Proposed Pullman National Historical Park

Submitted To:

National Parks Conservation Association

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Executive Summary

The National Parks Conservation Association (“NPCA” or “Client”) retained Market Feasibility Advisors, LLC (“MFA”) to assess the economic impacts of the potential designation of the historic Pullman neighborhood as a Pullman National Historical Park (“Park”) by the National Park Service (“NPS”). Pullman is a Chicago neighborhood located approximately 15 miles due south of downtown.

It appears that the Pullman Historic District features all the attributes necessary to be designated as a unit of the National Park System, an action that could greatly enhance the revitalization of the area and preserve the architectural and cultural heritage that makes it such a historical treasure. Pullman showcases 19th and 20th Century industrial society with unique stories of architecture, labor history—including formation of the first African-American labor union, landscape design, urban planning, and transportation history. The convergence of multiple stories of undisputed national significance makes Pullman worthy of national park status.

As an example of vertical integration, Pullman was only surpassed by Henry Ford’s River Rouge complex, presenting a historical model of corporate structure very much emulated in today’s world. Pullman offers ample opportunities for public use and enjoyment, in an environment rich in history.

The economic impacts of the proposed National Historical Park designation would vary greatly depending on the specific actions taken in regards to that designation. It is MFA’s understanding that at this time NPS has not created any plans, let any contracts, or partnered with any concessionaires to operate anything in Pullman. Given the status of the project, MFA has, with Client input, made a series of assumptions upon which to build this evaluation.

One key assumption is that NPS would, either directly or in partnership, own and operate the Pullman factory site and building located on the northeast corner of 111th Street and Cottage Grove Avenue (“factory site”). The factory site is currently owned and operated by the State of Illinois Historic Preservation Agency (“IHPA”). It requires significant renovation and currently offers minimal programming. A second key assumption is that NPS with cooperation of partners/concessionaires would operate interpretive centers and programs that tell the many stories of Pullman and provide an experience worthy of a National Park.

In this analysis, MFA has estimated related potential economic impacts in three main categories based on the following assumptions:

1. Any construction projects would create one-time direct impacts for the community consisting of construction jobs and wages, material purchases, plus the indirect and induced impacts correlated to those direct impacts. While the construction-related economic impacts would last only as long as the construction does, the benefits of enhancing or preserving real assets would last much longer.
2. The operations of visitor services would provide a benefit to the community by directing Federal resources to the area. The operational impacts are comprised of the jobs and wages of rangers and other staff, as well as the material purchases and other expenditures in the community necessary to operate the Park. These expenditures together would act as a catalyst for other public and private economic activity.
3. National parks draw visitors from around the world; as such, the Park would draw visitors to the neighborhood. That said, since the Park would be in a larger complex urban environment, which already includes numerous cultural and tourist attractions drawing significant crowds, it

is unlikely that Park visitors will create a major boost in tourism to the Chicago metropolitan area.

These impacts would grow along with the site renovation, programming and concessionaire activities, and the related on-site visitation. Since a timeline and the actual content of specific projects and budgets is not known, MFA categorized the impacts into a baseline (the current situation) and three development phases: short-term, mid-term, and long-term as shown on the following table. Each phase would last several years as it's not likely that all of the fundraising and construction could be accomplished in a single year.

Each of the phases would entail adding more to the base asset. With the additions would come increased visitation, length of stay, and impact.

These impacts are summarized on the table that appears on the next page.

As is typical with new development, the first jobs set in motion would be construction jobs. These would take place during the short and mid-term impact phases. These jobs and their impacts last only as long as the construction phase. While of great interest to those in the construction industry and beyond, others may be more concerned with the ongoing jobs and continuing impacts created by asset investment and the NPS designation.

The baseline (current) situation supports 56 jobs (on and offsite), \$2.3 million in wages, and \$6 million in economic output. After implementation we project that the ongoing economic activity of an NPS branded Pullman destination scenario (post-construction phase and jobs), will support 356 jobs (on and offsite), \$15 million in wages, and \$40 million in economic output.

The jobs supported are not all onsite but rather the compilation of the direct, induced, and indirect impact jobs that result from the same proposed NPS Pullman operation. One business activity is expenditures from the actual facility on operations and a second is impact from spending by the visitors themselves.

These activities by NPS would have a positive impact on the community by providing a catalyst and support for ongoing efforts. The end result would be real jobs, wages and increased economic activity associated with the Park.

To come up with a fifteen year impact figure we assumed that the short, mid and long terms operations would each span a number of years and that the construction phase for each of the three short, mid and long terms would be completed in a single year under the prior terms operations (since the impacts from construction of new assets can't occur until the construction is completed).

The sequence would be as follows: in year 1 the short term construction program would carried out but since the improvements aren't built yet, it would still be baseline operations and short-term operations would begin the next year when its construction program would have been completed and continue through year 4. Year 4 would see mid-term construction under short-term operations and mid-term operations would begin the following year when construction would be completed and continue through year 8. That year long-term construction would be completed. Long term operations would begin in year 9 and continue through year 15.

The outcome is that in the first 15 years there would be an average of 317 jobs a year that will pay out an average of \$13.4 million in wages per year or a total of \$201 million in wages over the fifteen years (all dollars are 2013 dollars).

Table 1. Summary of Assumptions and Estimated Economic Impacts

	Baseline	Short Term	Mid Term	Long Term
Development Projects (NPS or Others)	Hotel Florence	Administration Building	North Wing Rear Shops	Firehouse Market Square Hotel Annex
Assumed NPS Operational Budget		\$350,000		\$3,500,000
Assumed NPS Staffing Levels		2-3		25-35
Estimated Visitation to National Park	50,000	150,000	300,000	300,000
Jobs (Direct, Indirect, Induced)				
Short-Term Construction	*	62	157	83
Annual From Operations	5	5	49	49
Annual From Visitation	51	153	307	307
Total** All Jobs	56	220	513	439
Total Ongoing Jobs (less construction jobs)	56	158	356	356
Wages (000) (Direct, Indirect, Induced)				
Short-Term Construction	*	\$3,888	\$17,407	\$5,181
Annual From Operations	\$242	\$242	\$2,420	\$2,420
Annual From Visitation	\$2,075	\$6,224	\$12,449	\$12,449
Total** Wages	\$2,317	\$10,354	\$32,276	\$20,050
Total Ongoing Wages (less construction wages)	\$2,317	\$6,466	\$14,869	\$14,869
Output (000) (Direct, Indirect, Induced)				
Short-Term Construction	*	\$9,740	\$43,606	\$12,977
Annual From Operations	\$682	\$682	\$6,818	\$6,818
Annual From Visitation	\$5,374	\$16,122	\$32,244	\$32,244
Total** Output	\$6,056	\$26,544	\$82,668	\$52,039

* Assumed project in place - not attributed to NPS designation

**Total combines short-term construction impacts with annual ongoing operational and visitation impacts. Use this figure with caution.

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Assignment

Scope of Work

The National Parks Conservation Association (“NPCA” or “Client”) retained Market Feasibility Advisors, LLC (“MFA”) to assess the potential designation of the historic Pullman neighborhood as a Pullman National Historical Park (the “Park”) by the National Park Service (“NPS”). The focus of this assignment is the economic impacts of this designation and its related transaction(s) and programming.

This analysis, like the economic impact assessments performed by NPS, estimates output, jobs, and wages. Unlike many other NPS assessments, however, this analysis also evaluates a hypothetical or potential development and programming situation as opposed to the operations of an existing NPS unit. NPS has not drawn any plans, let any contracts, or partnered with any concessionaires to operate Pullman. No programming or staffing plans yet exist. That said, reasonable parameters have been created for this analysis by using the following approach.

- Assess the current and prior operations of existing historic sites within Pullman.
- Research peer NPS areas including National Historical Parks and National Historic Sites, as well as non-NPS locations with one or more similar characteristics.
- Interview local stakeholders to understand their activities and the potential relation to a National Historical Park.
- Analyze the demographic and visitor marketplace context for Pullman.

Based on these factors, MFA was able to derive a range of reasonable actions to model and their likely impacts.

Background and Context

Pullman Neighborhood: Physical and Locational Character

Pullman is a neighborhood located approximately 15 miles south of “the Loop” in Chicago, Illinois. It is bounded on the east by Interstate 94, which runs through downtown Chicago and connects to cities like Detroit and Milwaukee. There are I-94 interchanges at 103rd, 111th and 115th streets; a Walmart-anchored development is underway at the 111th interchange on former industrial land. This and other industrial and commercial uses (including the factory complex) physically divide residential areas of the long, narrow neighborhood into north and south.

Pullman residential areas are largely comprised of row houses, two-flats, and smaller apartment buildings. Most of the community was built in the 1880s, as described in the history below. On the north side of Pullman, there are some in-fill houses circa 1950s and 1960s.

On the west, a railway embankment separates Pullman from the West Pullman and Roseland communities, with roadway underpasses only on the odd-numbered streets. These areas consist of a typical Chicago mix of three-story walk-up apartments and two-flats; storefronts are along most major roads. Palmer Park runs from 109th to 113th a few blocks west of the Factory site and building.

Lake Calumet lies to the east, across I-94, as does the 36-hole Harborside International Golf Course, which is on a former landfill and is owned and operated by the Illinois Port Authority.

An industrial area, with a significant number of brownfields, lies to the south. The largest component of this area is a water treatment plant.

To the north, again divided by I-94, are the Chatham and Burnside neighborhoods. Chicago State University and Olive-Harvey College are significant institutions in this area.



Pullman History

Pullman's formation is a potent American story, albeit with a quite short-lived history. This history is well documented in other publications, so MFA provides only a brief summary here. In 1880, George Pullman purchased 4,000 acres to build an idealized company town. The first residents moved there in 1881; less than 20 years later (1898), the Illinois Supreme Court ruled that the Pullman Palace Car Company ("Company") divest itself of all non-industrial ownership. (The town of Pullman had been annexed to the City of Chicago in 1897.) Rail cars would continue to be manufactured there until 1981, although the main factory closed in 1957. Even in this short time period, Pullman is the site and source of several historical and cultural story lines that are each individually important. When taken together, the different aspects of Pullman represent a truly unique American experience.

- The Great Migration from south to north of African Americans through the spreading of news about economic opportunity by word of mouth and the distribution of the Daily Defender to the south by Pullman porters and other workmen on the trains
- The community was designed as the first all-inclusive company town, with notable physical structures used for industrial, residential, commercial, and civic activities. This approach to development demonstrates important aspects of architecture and urban planning. Numerous architectural gems remain intact or can be renovated and preserved.
- Pullman manufactured and operated the Pullman Palace luxury railway passenger cars, key elements of the industrial revolution and Chicago's formation as a transportation hub.
- Organized labor was a significant factor in addressing the multi-faceted economic relationship between the residents of the community and the Pullman company. Pullman was both employer and landlord. A cut in wages without a simultaneous reduction in rent resulted in a national strike in 1894.
- Pullman played a key role in the country's racial history, with the first African-American Pullman Porters union creating opportunities for its members not found elsewhere. What was created was the opportunity for the rise of an African-American middle class. Vestiges of ethnic divisions remain, and in some ways have entrenched at different points in the neighborhood's history.

Pullman Buildings

There are several key physical structures in the neighborhood. Targeted projects could enhance and leverage the significant community support that already exists for encouraging increased visitation to the area. In several other urban historical parks, NPS has acquired key structures, but most remained in private ownership. Likewise, these projects have qualified for Historic Preservation Tax Credits, leveraging state, local, and private investment. These or other approaches may be appropriate for key Pullman buildings.

Factory Site and Buildings

The largest historic site and building in Pullman is the Factory Site, located on the northeast corner of 111th and Cottage Grove and built in 1881. This complex is central to the neighborhood, acting as a planning keystone and dividing the community between the north and south residential areas. Three buildings remain on the 12.5 acres as unheated masonry shells. The Factory Site is currently owned by the Illinois Historic Preservation Agency ("IHPA"), which allows certain local community groups to use the grounds for activities such as community gardening and bee-keeping. Tours and programming have occurred on site as resources have allowed, but both IHPA and local groups desire more. According to IHPA, approximately 8,000 to 10,000 visitors annually sign in at the visitor center across a street and park. That figure has climbed to about 15,000 recently given the recent publicity and selected events.

The site is currently zoned for industrial use by the City of Chicago. A portion of this site, as well as a few other locations, is being considered for artist live-work lofts.

- The 27,000-square-foot three-story Administration Building exterior shell, with its signature clock tower, was stabilized and rebuilt after a fire in 1998.
- The North Factory Wing is a 26,300-square-foot one-story structure attached to the Administration Building. This is largely a series of open spaces with high ceilings.
- The 36,600-square-foot Rear Erecting Shops structure still has several of its walls and roof supports; however, the roof was removed in 2001 due to concerns about stability.

Hotel Florence

The Hotel Florence, located south across 111th from the Factory site and buildings, is also currently owned by IHPA, which acquired the property from the Historic Pullman Foundation. The non-profit Historic Pullman Foundation purchased the property in 1973 and for many years operated a restaurant, known for its Sunday brunch, to support the preservation efforts.

The main 28,500-square-foot hotel was constructed in 1881, and a 16,000-square-foot annex was added in 1914. Both brick buildings are four stories tall, and are vacant except for IHPA site offices. The State of Illinois recently issued a Request for Information (RFI) to reopen a restaurant or other activity on the first floor of the main hotel after spending \$3.5 million in systems and finishes necessary for that occupancy. The upper floors would require additional renovation for occupancy, although, reportedly, load restrictions may limit or eliminate utilization. All told, the State has invested approximately \$25 million in the site. This investment, and subsequent site re-development as a visitor destination, will undoubtedly increase visitation. According to the Historic Pullman Foundation, when the restaurant was operational, approximately 60,000 people visited the site each year.

Table 2. Typical Pullman Annual Visitor Activity (1980s / 1990s)

Hotel Florence Restaurant and Visitor Center			
Activity	Persons/Unit	Days Per Year	Total
Average Daily Restaurant	100	300	30,000
Brunch	150	52	7,800
Victorian Dinner	5	150	750
Special Day Brunch	4	350	1,400
School/Charter/Senior Tours	150	50	7,500
House Tour Weekend			1,000
Walk-ins non-restaurant	20	300	6,000
Drive thru tour bus /unscheduled	50	52	2,600
Total			57,050

Source: Historic Pullman Foundation

Market Square / Market Hall

The Historic Pullman Foundation currently owns the 7,800-square-foot Market Hall, which opened in 1892 after the original 1881 building was burned. The facility, a few blocks south and east of the hotel, is a central building, surrounded by the Market Square colonnade with second-story residential units above storefronts. A subsequent 1973 fire destroyed much of the central building, which has been stabilized without a roof. The owner plans to renovate the structure when a feasible use is determined. (The Historic Pullman Foundation currently operates a visitor center, with a collection of Pullman artifacts, in a non-historic building located on the site of the former Arcade building southwest of the hotel.)

Pullman Stables

Originally constructed to service the horses and carriages, the Pullman Stables are now used as a private automobile repair facility. They are located just to the south of the site of the former Arcade building. The steep shingle roof is a distinctive feature of this property, which has evidence of deferred maintenance.

Greenstone United Methodist Church

Constructed in 1881, the 600-seat church is home to a United Methodist congregation that has been at this location since 1907. A key historical element of the facility is the organ, with 1260 pipes, one of the few without electronic controls remaining in the US.

Pullman Firehouse

The 3,500-square-foot Pullman Firehouse, at 601 E 108th St., is one of the few community facilities located north of the Factory Complex. The two-story property, with a four-story tower, is currently owned by the City of Chicago and is available for redevelopment via its negotiated sale process. A condition assessment performed in 2011 indicated that the property needs a complete renovation.

Second Pullman School

Constructed in 1917, this property, the George Pullman School, was the second, larger, school building built for the local children in Pullman. It is currently operated as an elementary school by Chicago Public Schools but has recently been on a large school closure list under consideration by Chicago Public Schools and may be closed.

Residential

One of the key characteristics of Pullman was the approach to residential development. The company-owned housing had more amenities than was typical of the time period. It addressed all levels of employee, from upper management to labor. The houses were almost exclusively brick, had access to private yards, and were laid out in such a manner as to provide light and ventilation into every room. Currently, besides individual homeowners, there are numerous agencies addressing the housing needs in the community. These include Neighborhood Housing Services (NHS), Chicago Neighborhood Initiatives (CNI), Mercy Housing, and others. Historic preservation guidelines are in place for most or all of these properties. In spite of these efforts, numerous properties remain vacant, abandoned, and / or with deferred maintenance. According to the US Census, there are about 2,500 dwelling units in the community, but over 400 of those are currently vacant.

Local and State Designations

State Historic Site: As mentioned above, the Pullman Factory and Hotel Florence are State Historical Sites owned by the Illinois Historic Preservation Agency. IHPA operates almost 60 properties statewide. Besides the two properties in Pullman, IHPA has the Lincoln Museum, Lincoln Library, and Lincoln Tomb in Springfield. These sites are often toured in conjunction with the Lincoln Home NHS, which is profiled herein. IHPA also operates New Salem, a preserved and recreated 1800s village which carries a state designation. This designation is similar to the National Historic Site designation, except on a statewide basis. IHPA both owns and manages its holdings.

City of Chicago Landmarks District: The historic area of Pullman, both north and south, are within a Landmark District, which is administered by the Commission on Chicago Landmarks. The nine-member commission is appointed by the Mayor, with City Council consent, and is staffed through the Department of Housing and Economic Development. Any permits relating to buildings, structures, and sites within these districts, or individually listed, are reviewed by the Commission. There are no special resources provided with the designation.

City of Chicago Neighborhood Opportunity Area: Pullman is one of seven areas identified in the second quarter of 2013 by Mayor Rahm Emanuel as deserving a focused investment. The proposed National Historical Park designation was a key element in making this designation, along with the new

mixed-use development at 111th and I-94. The seven areas are targeted with \$330 million in public funds, aimed at leveraging \$2.6 billion in private investment.

City of Chicago Tax Increment Financing: North Pullman is in a Tax Increment Financing (TIF) district. There are numerous TIF districts across Chicago; in fact, TIF has been a popular financing tool for community development for several decades across the US. In essence, the increase (increment) in property taxes that are related to a TIF project can be recaptured to finance bonds that make the project feasible. There is a “but for” test, in which the project is assessed to ensure the TIF bonds are necessary. Additionally, bond proceeds need to be used for public improvements. In Pullman’s case, streetscape improvements along 111th and Cottage Grove are being considered for current TIF funds. This designation is typically used as an incentive for development.

Federal Programs: Finally, due to the economic and demographic characteristics of the area, Pullman qualifies for several Federal programs that are administered through state or local agencies. Examples include:

- Community Development Block Grants administered through the Chicago Department of Housing and Economic Development
- Low Income Housing Tax Credits administered through the Illinois Housing Development Agency
- Neighborhood Stabilization Program administered through the City and local partner agencies.

If designated as a NHP, MFA understands that other local and federal programs related to transportation and energy may also be available.



Factory Complex



Firehouse



Hotel Florence

Visitor Center
(site of destroyed Arcade)



Greenstone Church



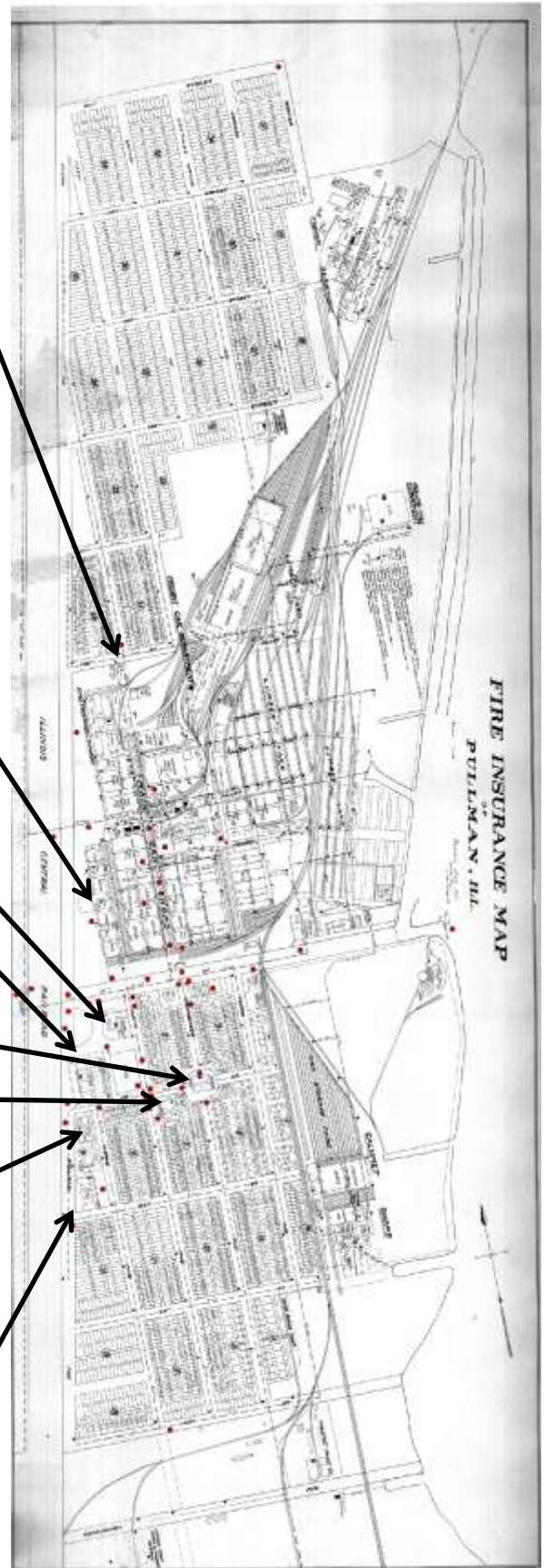
Market Square



Motor Stables



Pullman School



City of Chicago Context

Demographics

Chicago is the third largest metropolitan area in the US, home to some 9.5 million people. From 2000 to 2010, the area grew about 4%, and population continued to shift from the central city to the suburbs. This trend has continued for the last half-century or more in most US metropolitan areas. There is a significant counter-trend, however, with population growth in central cities and trendy neighborhoods. In Chicago, this phenomenon has led to the reemergence of areas like the South Loop and West Loop, and continued gains in areas like Streeterville and Lincoln Park, neighborhoods just north of downtown.

Table 3. Metropolitan Chicago Demographics

Year	2000	2010	2012	2017
Population	9,098,316	9,461,105	9,543,629	9,684,085
Households	3,280,055	3,475,726	3,495,249	3,574,345
Owner Occupied	(65%) 2,138,609	(66%) 2,293,837	(65%) 2,267,345	(66%) 2,342,288
Renter Occupied	(35%) 1,141,446	(34%) 1,181,889	(35%) 1,227,904	(34%) 1,232,057

Source: US Census Bureau, ESRI

Unfortunately for Pullman, it is not one of these growth neighborhoods. According to the 2010 Census, Pullman is now home to approximately 5,000 residents, down from about 6,000 in 2000. Vacancy increased from about 10% of the total housing units in 2000 to about 17% in 2010. Of these vacant units, over 50% are categorized as “other” (i.e. not “for rent” or “for sale”), indicating that these are properties in distress. Furthermore, unlike the metropolitan area, a majority (57%) of Pullman residents are renters, while only 27% are owner-occupants.

The median household income (half of all households are above; half below) in Pullman is about \$26,000, while the average household income is \$37,000 - the greater the difference between the median and average household incomes the greater the economic diversity in an area. This spread suggests a modest amount of economic diversity among Pullman households. This compares with a metropolitan median household income of \$57,000 and an average household of \$78,000.

According to the Census, the median home value in Pullman is about \$120,000, but this figure appears optimistic when compared to local real estate listings and foreclosures. The regional multiple listing service notes 33 sales from April 2012 to March 2013 ranging from \$1 to \$142,000, with an average of \$47,900 and median of \$37,000. Currently, it costs more to renovate area homes, particularly when addressing historic preservation, than they are worth in the marketplace. To fill the gap, several non-profit organizations including Chicago Neighborhood Initiatives, Neighborhood Housing Services, and Mercy Housing, active in the area and utilizing government programs such as Neighborhood Stabilization Program and Low Income Housing Tax Credits. Demographically, over 75% of Pullman residents are African-American, compared with 17% for the metropolitan area. Historically and currently, this ratio is even higher in the northern half of Pullman.

An important factor to note regarding Pullman’s demographics in the context of a National Historical Park is that the operations are expected to be a catalyst for improvement in a troubled community where efforts to address the issues are currently underway.

Economics

The economic base of an area is a key factor in the derivation of impact multipliers, which estimate the indirect and induced effects of economic activity within that geography. (These terms are defined more fully in a following section.) If industries that support certain activities are available locally, then the impacts of those activities will be greater. If support industries are not available locally, then the expenditure “leak” out of the area is greater and the indirect and induced impacts are lower.

The economic base of the Chicago area is quite diverse, with a mix of manufacturing, retail, and service employment. Therefore, the impact multipliers tend to be higher than they would be in small cities and rural

areas where not all expenditures can be absorbed and any intervention can have a positive effect on the local economy.

Table 4. Chicago Employment by Industry

Industry	Establishments	Employees	Percent
Agriculture & Mining	6,341	43,921	0.9%
Construction	28,311	197,987	4.2%
Manufacturing	15,572	518,718	10.9%
Transportation	13,640	159,679	3.4%
Communication	3,174	37,130	0.8%
Utilities	929	16,565	0.3%
Wholesale Trade	17,292	234,702	4.9%
Retail Trade	74,391	968,751	20.4%
Fin, Ins, Real Estate	36,434	419,080	8.8%
Services	149,339	1,915,244	40.3%
Government	5,943	192,105	4.0%
Other	10,992	44,638	0.9%
Total	362,358	4,748,520	100.0%

Source: Info Group via ESRI

Visitation

Tourism is a key industry segment for all national parks. Tourism, as well as business-related travel, is also a significant factor in the Chicago economy. There are over 30,000 hotel rooms in Chicago's central area, with many more along the major arteries and in the suburban commercial nodes. Chicago has two major airports, as well as numerous regional operations. O'Hare has approximately 900,000 flights per year, while Midway has about 250,000. Combined they serve over 85 million passengers annually. Additionally, Chicago is well served with regional rail, including Amtrak, bus service, and a network of Interstate highways.

There are over 40 million visits to Chicago each year, of which approximately three in four are for leisure purposes. It is estimated that this results in over \$10 billion in annual impacts (about \$240 per visit), supporting 128,000 jobs. The level of visitation dropped in the recession, but has recovered somewhat in the last few years. The most significant point to make is that any visitation to Pullman may incrementally increase Chicago visitation and its related economic impacts, but it will not make a discernable impact and would by not by itself drive regional visitation.

Table 5. Chicago Area Tourism Statistics

Year	Domestic Business Visits (Millions)	Domestic Leisure Visits (Millions)	International Visits (Millions)	Direct Impact (Billions)	Employment
2004	11.1	26.9	0.9	\$8.30	128,200
2005	11.2	29.0	1.1	\$8.84	128,800
2006	11.4	32.8	1.1	\$9.74	129,700
2007	12.3	32.8	1.2	\$10.15	132,300
2008	12.2	32.1	1.4	\$10.23	131,900
2009	9.6	28.9	1.1	\$8.90	124,600
2010	10.1	28.0	1.1	\$9.75	124,400
2011	10.6	31.8	1.2	\$10.45	128,300

Source: DK Shifflet, USTA, US Dept of Commerce (via Choose Chicago)

Another factor to consider is that while the total visitation to the Chicago area is among the highest in the US for a city, the duration of trip can vary widely. As shown in Table 6, over half of the travelers come only for the day, and another third of the visitors stay only one to three nights. Furthermore, about one third of the travelers are families with kids. The rest are parties of adults of various sizes. This may be similar to NPS units within metro areas but it differs from visitation patterns to NPS units outside of metro areas. Visitors patronizing the large resource-based parks are on extended trips. MFA anticipates that Pullman National Historical Park visits would typically consist of a few hours within typical travelers' broader itineraries as is the case at other NPS units in metro areas.

Table 6. Chicago Area Traveler Characteristics

	2006	2009
Length of State of Leisure Travelers		
Daytrips	53.0%	55.0%
1-3 Nights	34.0%	35.0%
4-7 Nights	9.0%	11.0%
8+ Nights	4.0%	3.0%
Household Income of Leisure Travelers		
Under \$50K	31.0%	31.0%
\$50K-\$75K	22.0%	17.0%
\$75K-\$100K	16.0%	22.0%
\$100K+	31.0%	31.0%
Party Composition of Overnight Travelers		
One Adult	17.0%	17.0%
Couples	27.0%	32.0%
Families w Kids	35.0%	29.0%
MM/FF	8.0%	9.0%
3+ Adults	13.0%	14.0%

Source: DC Shifflet & Associates

Market Potential and Operational Assumptions

Introduction

In order to determine the range of likely visitation and spending, MFA considered the market context presented in the previous section. Additionally, MFA examined the performance of a wide range of cultural and other attractions in Chicagoland. Finally, statistics for the whole breadth of NPS units were considered, with specific indications drawn from operations most similar to Pullman.

Chicago Cultural Attractions

Pullman assets are not currently programmed or promoted to the extent that they could be. Currently, IHPA estimates there are about 15,000 visits annually to the site. When a restaurant was operating in the hotel, the site drew between 50,000 and 60,000 visits annually. Numerous stakeholders believe the community can bring considerably more visitors than these numbers, and MFA concurs.

According to surveys, historic sites only draw 4% to 7% of all regional visitors, and nationally museums only draw about 5%. However, in Chicago museums are much more successful than historic sites and draw between 17% and 18% of the total visits, far above the national norm and the 4% to 7% that historic sites draw. Two key indications can be drawn from these statistics. First, Chicago is known for its cultural attractions, and many visitors are drawn to the area because of them. Secondly, using the classification system shown in Table 7 below, if Pullman can be transformed from a “historic site” in the minds of Chicago visitors into a “museum” site, it could possibly triple or quadruple its baseline visitation, as museums do far better in visitation than historic sites. One way to do this would be to position it as an outdoor living history museum, a category with dozens of examples across the US from Sturbridge Village and Williamsburg in the east to Connor Prairie (Indianapolis) and Living History Farms (Des Moines) in the Midwest.

Table 7. Top Tourist Activities

Activity	2006		2009
	Chicago	US	Chicago
Dining	38%	29%	31%
Shopping	33%	27%	30%
Entertainment	31%	23%	29%
Sightseeing	34%	19%	21%
Museum/Art	18%	5%	17%
Night Life	19%	7%	14%
Watch Sports	7%	5%	11%
Concert, Play, Dance	11%	6%	9%
Visit Historic Site	7%	6%	4%
Festival, Craft Fair	8%	5%	3%

Source: DK Shifflet & Associates

Some specific examples of Chicago area cultural sites and their visitations are presented in Table 8. As shown, architectural tours and museums near the Loop are some of the most heavily patronized. Central Chicago is the nexus of tourism activity for the region, and enhanced linkages to that nexus will help Pullman visitation. MFA is aware of six organizations offering a combination of architectural walking, boat, and bus tours, mostly downtown. Any one or all of these could become potential partners with NPS, bringing established track records and client bases. Numerous kiosks already exist that could be launching pads for out-of-town guests. MFA understands NPS is considering an Urban Beta Site storefront in downtown Chicago that may tie nicely into such a program. Volunteers could help patrons navigate Metra or offer transportation to and from the Loop.

Other attractions, particularly non-profit organizations like the Frank Lloyd Wright Preservation Trust, DuSable Museum, and Museum of Mexican Art, share some local/national blend of museum/historical

characteristics with the proposed national park in Pullman and may be indicative of visitation potential. These neighborhood attractions capture between 120,000 and 160,000 visits annually.

Table 8. Selected Chicago Area Historic and Cultural Attractions / Organizations

Institution	Location	Attendance	Admission Range*
Lincoln Park Zoo / Conservatory	Neighborhood	3,000,000	Free
Chicago Trolley & Double Decker	Central	2,860,000	\$31/\$15
Brookfield Zoo	Suburban	2,158,185	\$15/\$10.50
Shedd Aquarium	Central	2,120,900	\$8/\$6
Museum of Science & Industry	Neighborhood	1,568,700	\$15/\$10
Art Institute of Chicago	Central	1,440,599	\$18/\$12
Field Museum of Natural History	Central	1,282,978	\$15/\$10
Chicago Cultural Center	Central	910,000	Free
Morton Arboretum	Suburban	831,436	\$12/\$9
Chicago Architecture Foundation	Central/Suburban/Neighborhood	488,000	\$38/\$10
Adler Planetarium	Central	460,000	\$12/\$8
Chicago Children's Museum	Central	417,440	\$12/\$12
Kohl's Children's Museum	Suburban	342,877	\$9.5/\$9.5
DuPage Children's Museum	Suburban	332,065	\$9.5/\$9.5
Peggy Notebaert Nature Museum	Neighborhood	271,928	\$9/\$6
Museum of Contemporary Art	Central	250,138	\$12/Free
Chicago History Museum	Central	206,682	\$14/Free
Little Red Schoolhouse Nature Center	Suburban	182,000	Free
DuSable Museum of African-American History	Neighborhood	161,347	\$8/\$2
Garfield Park Conservatory	Neighborhood	159,969	Free
National Museum of Mexican Art	Neighborhood	156,749	Free
Frank Lloyd Wright Historic Preservation Trust	Central/Suburban/Neighborhood	120,000	\$25/\$12
Blackberry Farm and Pioneer Village, Aurora	Suburban	38,000	\$7/\$6
Trailside Museum Nature Center, River Forest	Suburban	16,500	Free
Sand Ridge Nature Center, South Holland	Suburban	15,000	Free

* Several venues have additional charges for special exhibits or events.

Source: Venues, Crain's Chicago Business, MFA

Indications from NPS Units

As shown in Table 9, visitation varies greatly by type of unit. The average visitation at National Parks is approximately twice that of National Historical Parks, and almost ten times that of National Historic Sites. National Parkways received the most visits per unit, which can be at least partially attributed to commuters. National Preserves and National Wild & Scenic Rivers drew the fewest. The large National Parks in the western states tend to draw between two and five million each year, as do several of the National Monuments along the east coast.

Table 9. National Park Service Visitation by Unit Type: 2011

Units Administered by Type	Percent Total Visits	Recreation Visits	Units Reporting Visits	Units Administered	Rec Visits / Unit
International Historic Site	0%	0	0	1	N/A
National Battlefield	1%	1,784,194	10	11	178,419
National Battlefield Park	1%	2,583,758	4	4	645,940
National Battlefield Site	0%	0	0	1	N/A
National Historic Site	3%	9,600,827	76	78	126,327
National Historical Park	10%	27,685,059	43	46	643,839
National Lakeshore	1%	3,925,961	4	4	981,490
National Memorial	11%	30,644,202	29	29	1,056,697
National Military Park	2%	5,053,113	9	9	561,457
National Monument	8%	23,048,300	70	75	329,261
National Park	22%	62,614,260	58	58	1,079,556
National Parkway	11%	29,713,173	4	4	7,428,293
National Preserve	1%	2,902,815	18	18	161,268
National Recreation Area	17%	47,365,896	17	18	2,786,229
National Reserve	0%	95,764	1	2	95,764
National River	2%	4,312,827	5	5	862,565
National Scenic Trail	0%	0	0	3	N/A
National Seashore	7%	18,801,331	10	10	1,880,133
National Wild & Scenic River	0%	1,044,888	7	10	149,270

Park (Other)	3%	7,762,848	9	11	862,539
NPS TOTAL	100%	278,939,216	374	397	745,827

Source: National Park Service

From the total universe of units, MFA selected a subset that may better inform the likely attraction for Pullman. About 50 parks and sites were initially chosen for a combination of setting, story, approach and amenity characteristics. Since no two parks are exactly alike, these comparable units were examined for lessons learned or indications of success, not as facsimiles of Pullman. From that group, a smaller set of comparable parks was chosen for additional analysis. As shown in Table 10, the confirmed visits of these comparable locations range from about 55,000 to 667,000. Staffing ranges from three to almost 100, and budgets range from \$350,000 to over \$8 million.

Table 10. 2011 Visitation, Budget, and Staffing at Selected NPS Units

Park Unit	Recreation Visits	Staffing	Visits / Staff	Budget (000)	Budget / Staff	Budget / Visit
Boston African American NHS (MA)	379,906	8	47,488	\$785	\$98,125	\$2.07
Harpers Ferry NHP (WV)	255,348	92	2,776	\$6,712	\$72,957	\$26.29
Lincoln Home NHS (IL)	296,214	35	8,463	\$2,808	\$80,229	\$9.48
Lowell NHP (MA)	520,452	86	6,052	\$8,347	\$97,058	\$16.04
Martin Luther King, Jr. NHS (GA)	666,482	36	18,513	\$4,110	\$114,167	\$6.17
New Orleans Jazz NHP (LA)	130,393	12	10,866	\$1,282	\$106,833	\$9.83
Paterson Great Falls NHP (NJ) est. 2011		2	New	\$350	\$175,000	New
Rosie the Riveter NHP (CA)	14,778*	13	1,137	\$1,299	\$99,923	\$87.90
Thomas Edison NHP (NJ)	55,284	32	1,728	\$2,870	\$89,688	\$51.91

*Unofficial – Does not yet report. Visitor Center opened in 2012

Source: National Park Service, MFALLC

When comparing budgets to staffing levels, the correlation is quite clear. There is a relatively tight budget range of \$80,000 to \$110,000 per full time equivalent staff. Only Paterson falls significantly out of this range, which is explained by the start-up aspects of this attraction. The budget per visitor, however, varies greatly unit by unit. The units with lower draw tend to have significantly higher ratios.

The annual visitation figures are by no means static. The following table presents visitation trends for seven of the nine parks in Table 10. Paterson doesn't have enough of an operating record and Rosie the Riveter had some start up issues. Many parks received a bump in attendance a year or two after opening. This is common for attractions, which receive a significant initial marketing push and draw patrons seeking new experience. More stabilized figures are typical in following years, with dramatic changes occurring with a notable change. For example, Thomas Edison NHP recently underwent a renovation, which explains the 2005 figure and subsequent bump. Some parks are experiencing waning attendance, such as Lincoln Home NHS, Harpers Ferry NHP, Lowell NHP. Others are growing like Martin Luther King, Jr. NHS and Boston African American NHS. Summaries of these key parks are provided in the Addenda.

Table 11. Visitation Trends at Select NPS Units

Year	Boston African - American NHS	Harpers Ferry NHP	Lincoln Home NHS	Lowell NHP	Martin Luther King, Jr. NHS	New Orleans Jazz NHP	Thomas Edison NHP
1960		585,800					23,800
1965		789,800					45,100
1970		1,120,900					55,900
1975		780,000	494,000				52,600
1980		549,997	408,434	274,149			44,695
1985		566,661	431,347	706,921	377,069		32,599
1990	194,531	542,619	452,894	728,112	1,348,652		55,872
1995	358,029	386,247	428,202	495,773	424,674		55,760
2000	393,175	317,699	367,968	604,787	612,065	16,711	12,863
2005	327,921	241,807	419,552	722,458	624,848	40,242	0
2010	333,463	268,822	354,125	540,475	658,452	80,195	63,009
2011	379,906	255,348	296,214	520,452	666,482	130,393	55,284
2012	404,248	263,105	295,464	537,551	707,514	177,909	52,554

Source: National Park Service

Key Assumptions

Probably the largest factor in this assessment is determining what the Park will look like. NPS units run the gamut with vast dissimilarities. Thus there is no “typical” NPS project that can be used as a model. MFA took the liberty, with client input, of putting together the following two significant assumptions:

1. NPS would, through direct ownership and with the help of partners, renovate the Administration Building of the Pullman Factory for a visitor center, interpretive area, event space, leasable space, and other programming. At 27,000 square feet, the project will likely include programming beyond NPS interpretation. There are many properties that could be renovated in the context of the Park. These options are addressed further in the construction cost assessment.
2. NPS would operate an interpretive program with full-time rangers, and coordinate private-sector concessionaires for tours and other hospitality. It is expected that the operations would have a modest start, but then pick up momentum. The timing of this momentum is completely dependent on the timing of the facility development, staffing and programming activities.

Based on these assumptions, and given the market potential, MFA projects the likely visitation to the Park as follows:

Table 12. Operational Assumptions and Visitation Projections

	Baseline	Short Term	Mid Term	Long Term
Development Projects (NPS and others)	Hotel Florence Café	Administration Building	North Factory Wing Rear Erecting Shops Hotel Florence Upstairs	Firehouse Market Square Hotel Annex
NPS Operations	\$350,000		\$3,500,000	
Staffing	2-10		25-35	
Visitation	50,000	150,000	300,000	300,000

Source: MFALLC

Baseline: MFA expects that the current discussions, leading up to the assumed announcement of the Pullman Historical National Park, will enhance and support the current State of Illinois efforts to find a partner for a Café on the first floor of the Hotel Florence. Once opened, visitation is likely to be at least as good as when the Café previously operated, although many elements of the community have changed since the 1990s. Furthermore, the opening of the Café could begin to transform the image of the area from “historical site” to “museum” – a favorable change discussed previously. Both of these factors indicate a reasonable projection of visitation of about 50,000 people annually, up from about 15,000 today.

Short Term: MFA assumes that the renovation of the Administration Building will begin almost immediately and an initial staff will begin to outline management options, potential partners, operational needs, and programming. Similar initial steps were taken at places like New Orleans and Paterson, NJ. Once the tours and programming are up and running, the operations could be similar to other Chicago neighborhood-based cultural attractions, and therefore have similar visitation patterns. This could be within the first five years from announcement. At this point, the impact of the NPS designation and actual site operations will begin to lead to MFA projected annual visitation of approximately 150,000 annually.

Mid Term: After the initial startup, MFA assumes the site would be staffed similar to Lincoln Home NHS, Thomas Edison NHP, and Martin Luther King Jr. NHS. Edison visitation is quite low compared to similar parks. This may be explained, in part, by a closure for renovations in the last decade. Although MLK is similarly situated in a neighborhood that is part of a major market, the history and role of MLK is more prominent than that of George Pullman, and therefore Pullman would not likely draw as much. Likewise, Abraham Lincoln was a more prominent person and therefore Pullman would logically draw fewer people than those attending the Lincoln Home in Springfield. Conversely, the Chicago visitor marketplace is significantly greater than that of Springfield. MFA's stabilized projection of 300,000 accounts for these offsetting factors.

Long Term: MFA assumes that, in the long term, additional physical assets are renovated and programmed. At this point, the additional activities could offset the likely tapering of visitation common to mature attractions as the initial years of pent-up visitation by locals tapers off a few percentage points.

Projected Impacts

Introduction

An economic and fiscal impact assessment analyzes the effect of a policy, program, project, activity or event on the economy of a given area. The impact area can be a neighborhood, community, region or nation. In this case, MFA assesses the impacts on the Pullman area (approximated by zip code 60628) as well as on Cook County. The project and program is the development and operation of a National Historical Park in Pullman.

The economic and fiscal impact is usually measured in terms of changes in economic activity (output, value added), associated changes in jobs, income (wages), and related tax revenues. To generate these estimates, MFA examined the potential construction projects, operational characteristics, and visitation patterns. Local economic multipliers from IMPLAN, a nationally recognized input-output software system, were then applied to derive the impacts.

In this analysis, the gross program expenditures or activities are being calculated. System-wide, NPS only receives 6% to 7% of its revenues from user fees. Last year vendor and patron receipts totaled about \$200 million of the \$3 billion budget. The remainder comes from federal appropriations. However, it is likely that there will be local, state, and other federal appropriations for roadway, and other public improvements. Furthermore, several public-private partnerships have been discussed. Therefore, some or all of these projects could leverage funds from sources beyond NPS, which is the case at many NPS units.

Methodology

Regional input-output (I-O) multipliers systematically analyze economic impacts and account for inter-industry relationships within and between regions. These multipliers are unique to each industry sector and geography based on economic make-up of the locality. Thus, a construction project will have a greater local impact on an area with a concentration of construction material suppliers, whereas a change to a banking policy will have a greater impact on an area with a concentration of financial institutions.

An impact analysis begins by identifying the economic activity related to the project being analyzed, such as expenditures on a program or increased sales from a new initiative. This activity is then assigned to the appropriate industry sector. The IMPLAN model includes information for 528 different industries, generally at the three- or four-digit NAICS code level. IMPLAN multipliers are then selected based on the impact area geography, and are applied to each sector to calculate the indirect and induced impacts. For visitors, the National Parks System uses the MGMI model developed by Michigan State University, which selects standard industry classifications related to NPS activities. MGMI baseline settings are derived from visitor surveys and know economic modeling throughout the system. MFA utilizes components of this model for this analysis, although it should be noted that an urban park may have slightly different visitation than other parks, and therefore impact characteristics, to other sites. Furthermore, MGMI does not account for construction or operations. MFA includes these factors, using IMPLAN given the positive impacts these will have on the Pullman neighborhood and other areas of south Chicago.

The multipliers are an aggregation of the iterative nature of the economy. As a dollar flows through an economy, it touches various industries, some local and some non-local. The portion of the dollar spent locally turns over again. Each time a dollar changes hands, a portion of the economic activity spurs additional economic activity in the area, while some of the economic activity “leaks” to another area (out of Chicago). The multipliers capture this iterative process of dollars changing hands until the whole dollar is leaked out of Chicago.

A large study area (a state, for example) could have high multipliers because a greater portion of activity required to support the change in final demand would come from within a state’s boundaries than from, for example, a county or a zip code. For a small study area like a county or zip code, multipliers would be

lower because the economy is not as diverse and large as a state's economy. As mentioned in a preceding section, Chicago has a diverse economic base and therefore can benefit from these impacts. However, MFA expects a significant amount of leakage from zip code 60628.

Short Term Construction Impacts

Some impacts, such as those associated with construction of a project or a short-term tax rebate program, end when the construction is complete or the rebate program ends. These impacts therefore are different than the ongoing impacts of a long-term program or operation of a facility.

For this assignment, MFA ran the IMPLAN model, placing the estimated cost of potential projects into either the commercial or residential construction industry sector, letting the model select the distribution of expenditures across the various industries for secondary (indirect / induced) impacts. Impacts would change with inflation and tax rates in subsequent years, but this provides the reader with a contemporary sense of the impact's value. As a further assumption, preference is given to local industries to supply the goods and services for the project. "Leakage" occurs only if an industry is not available locally. (The multipliers are lower if competition with outside suppliers is assumed.) The initial analysis shown in Table 13 provides a reasonable benchmark for comparison, but it lacks some of the possible refinement.

Table 13. Thumbnail Costs of Possible Construction Projects

	Size in SF	Cost / SF	Construction	Note
Factory Complex				
Administration Building	27,000	\$200	\$5,400,000	Reconstructed Shell
North Factory Wing	26,300	\$200	\$5,260,000	Stabilized Shell
Rear Erecting Shops	36,600	\$400	\$14,640,000	Needs Reconstruction
Hotel Florence				
Main Building*	28,500	\$150	\$4,275,000	1st FI Café; 2nd FI unfinished
Annex	16,000	\$200	\$3,200,000	No Current Plans for annex
Pullman Fire House				
	3,500	\$250	\$875,000	Listed for Negotiated Sale
Market Square / Market Hall				
	7,800	\$400	\$3,120,000	Needs reconstruction
Residential				
	1,000	\$200	\$200,000	Amount Per Unit

* Recent \$3.5 million renovation addressed first floor and some systems. Upper floors not yet renovated.
Source: IHPA, City of Chicago, MFALLC

Given the composition of local industries, the construction of a visitor center and other interpretive space at the Administration Building in the Pullman Factory Complex represents a direct impact of about \$5.4 million. When the indirect and induced impacts are added, the local output is expected to be in the range of \$6.6 million. Furthermore, the project is expected to support about 42 jobs in the zip code 60628 during the course of construction (see Table 14). These jobs should pay some \$2.6 million in wages. Since federal resources will be used at least in part, these jobs would pay prevailing wage. Furthermore, given the City's involvement, programs aimed to boost minority, women, and Chicago-resident employment could apply.

For purposes of our analysis for this assignment we used only the projects shown above in Table 13. However we also proved the results of other potential projects in Table 14 to show the further potential of this area.

Table 14. Short Term Economic Impacts of Possible Construction Projects

	Employment (FTE)			Wages (\$000)			Value Added (\$000)			Output (\$000)		
	Direct	Indirect Induced	Total	Direct	Indirect Induced	Total	Direct	Indirect Induced	Total	Direct	Indirect Induced	Total
Factory Complex												
Admin Bldg.	34	8	42	2,152	447	2,599	2,579	861	3,440	5,385	1,242	6,628
North Factory Wing	33	8	41	2,097	435	2,532	2,513	839	3,351	5,246	1,210	6,456
Rear Erecting Shops	91	22	113	5,836	1,212	7,048	6,993	2,334	9,327	14,600	3,368	17,968
Hotel Florence												
Main Building	27	6	33	1,704	354	2,058	2,042	682	2,723	4,263	983	5,247
Hotel Annex	20	5	25	1,276	265	1,540	1,529	510	2,038	3,191	736	3,927
Pullman Fire House												
	5	1	7	349	72	421	418	140	557	873	201	1,074
Market Square / Market Hall												
	19	5	24	1,244	258	1,502	1,490	498	1,988	3,112	718	3,829
Residential (Typical Unit)												
	1	0	2	80	17	96	96	32	127	199	46	245

Source: MFALLC, IMPLAN

If all of the projects listed above were undertaken, including a dozen residential units, the total output would be about \$47.8 million, supporting 300 short-term jobs paying almost \$19 million in wages. MFA ran the same model with Cook County as the impact area. The larger geography has more capacity and therefore greater indirect and induced impacts. In that instance, the development projects would support 444 short-term jobs, \$28 million in wages, and almost \$70 million in output.

Impacts from Operations

As mentioned above, MFA and the Client made some assumptions regarding the potential budget and therefore the related staffing and operational levels of the Park. Ideally, a more specific program is defined with estimated activity levels, customer draw, revenues and expenses, and those figures are utilized to calculate the likely impacts of the project. The projections in Table 15 should be viewed in the light of the generalized figures. Initial operations are estimated to start modestly, with a budget of about \$350,000 and two or three staff members. Stabilized operations are estimated at \$3.5 million, with 25 to 35 staff members. The impacts from the operations of the facility, based on these assumptions, are shown below.

Table 15. Proposed Pullman NHP Operating Impact Projections

Annual Budget	\$350,000	\$3,500,000
Employment		
Direct	3	27
Indirect	1	7
Induced	1	15
Total	5	49
Labor Income		
Direct	\$115,912	\$1,159,116
Indirect	\$43,678	\$436,782
Induced	\$82,411	\$824,107
Total	\$242,000	\$2,420,005
Value Added		
Direct	\$205,175	\$2,051,752
Indirect	\$82,236	\$822,364
Induced	\$136,327	\$1,363,277
Total	\$423,739	\$4,237,392
Output		
Direct	\$350,000	\$3,500,000
Indirect	\$116,804	\$1,168,045
Induced	\$215,015	\$2,150,153
Total	\$681,819	\$6,818,198

Source: MFALLC

As with most NPS units, it is reasonable to assume that the Park will leverage volunteers in addition to the paid staff, thereby increasing the non-economic impacts on the community. Furthermore, many parks leverage the resources of “friends” groups and related governmental programs. These resources do provide economic impacts and could be significant for Pullman, but they are not quantifiable at this point in the process.

Impacts from Visitation

In addition to the impacts from the internal operations of the facility, patrons will impact the area on their way to and from the activities. This analysis is pertinent to those patrons arriving from outside the impact area (zipcode 60628). According to the Illinois Department of Commerce, domestic visitors to the State spend about \$100 per day. Using US Travel Association figures, the average spending is about \$315 per person, indicating an average stay of approximately three days. Similar figures for international visitors confirm that they tend to spend more and stay longer.

Table 16. 2011 Direct Travel Expenditures in Illinois by Industry Sector

	Applicable to Day Trips	Domestic (millions)	Per Capita	International (millions)	Per Capita
Visitor Spending on:					
Spending per Industry Sector		93.3		1.26	
Public Transportation		\$7,263	\$77.84	\$348	\$277.13
Auto Transportation		\$7,416	\$79.48	\$36	\$29.00
Lodging		\$4,695	\$50.32	\$599	\$477.05
Food Service	x	\$6,934	\$74.32	\$390	\$311.08
Entertainment & Recreation	x	\$1,532	\$16.42	\$178	\$141.51
General Retail Trade	x	\$1,627	\$17.44	\$719	\$572.91
Total		\$29,466	\$315.82	\$2,270	\$1,808.69

Source: US Travel Association, MFA

It would be disingenuous to apply these figures to all visitors to the Park, since many of these visitors will have come to the area for multiple purposes. Likewise, the Park will not be a multi-day experience; visitors will likely spend a few hours there. Therefore, to estimate expenditure related specifically to the Park, MFA utilizes the Money Generation Model II (“MGMI”), developed by Michigan State University and utilized by

NPS for most of its impact assessments. The “Historic Sites” profile was used, as the closest scenario to fit an urban Historical Park.

Table 17. National Historic Site Average Visitor Spending

Category	Local Day Trip	Non Local Day Trip	Overnight Hotel	Overnight VFR*
Motel, hotel cabin or B&B	0.00	0.00	112.73	0.00
Restaurants & bars	15.01	17.88	46.02	9.33
Groceries, take-out food/drinks	7.33	6.55	7.78	9.10
Gas & oil	10.71	19.14	18.68	11.98
Other vehicle expenses	0.60	0.80	1.95	0.56
Local transportation	0.00	0.27	0.65	0.18
Admissions & fees	4.68	7.32	14.15	3.64
Clothing	0.86	1.53	3.88	1.60
Sporting goods	0.90	0.81	1.00	1.12
Gambling	0.00	0.00	0.00	0.00
Souvenirs and other expenses	7.74	9.57	14.24	8.13
Total	47.83	63.88	221.09	45.64

*VFR – Visiting Friends and Relatives

Source: MGMI Model, Michigan State University

As shown by these figures, most expenditures by NHS visitors are for food (including restaurants, take-out, and groceries), followed by gasoline and souvenirs. With the operation of the Park, it is these types of establishments that would emerge in the Pullman neighborhood first. These spending estimates were run through the IMPLAN model for both zipcode 60628 and Cook County, using MFA visitation estimates. The results are presented in Table 18 for the baseline, short-term, and mid-to-long term projections. As shown, once stabilized, the visitation to the Park is projected to create 75 jobs in the community, paying \$2.2 million in wages. For the County, these figures are 153 jobs paying \$6.2 million in wages.

Table 18. Economic Impact Projection of Visitors to National Historical Park in Pullman

	Pullman 60628			Cook County		
	Baseline	Short Term	Med / Long Term	Baseline	Short Term	Med / Long Term
Annual Visitation	50,000	150,000	300,000	50,000	150,000	300,000
Employment						
Direct	24	67	134	34	103	207
Indirect	1	3	5	5	15	31
Induced	2	5	10	12	35	70
Total	27	75	150	51	153	307
Labor Income						
Direct	\$673,693	\$1,826,932	\$3,653,864	\$1,094,478	\$3,283,331	\$6,566,867
Indirect	\$60,293	\$172,838	\$345,677	\$339,517	\$1,018,542	\$2,037,102
Induced	\$90,243	\$245,086	\$490,171	\$640,796	\$1,922,340	\$3,844,777
Total	\$824,228	\$2,244,856	\$4,489,712	\$2,074,791	\$6,224,213	\$12,448,746
Value Added						
Direct	\$968,443	\$2,640,863	\$5,281,727	\$1,728,801	\$5,186,264	\$10,372,808
Indirect	\$94,039	\$272,045	\$544,091	\$555,326	\$1,665,964	\$3,331,955
Induced	\$194,885	\$529,100	\$1,058,199	\$1,067,844	\$3,203,451	\$6,407,064
Total	\$1,257,367	\$3,442,008	\$6,884,017	\$3,351,971	\$10,055,679	\$20,111,827
Output						
Direct	\$1,514,105	\$4,202,116	\$8,404,232	\$2,833,587	\$8,500,581	\$17,001,521
Indirect	\$137,095	\$396,604	\$793,208	\$863,036	\$2,589,087	\$5,178,219
Induced	\$272,744	\$740,529	\$1,481,059	\$1,677,340	\$5,031,894	\$10,064,042
Total	\$1,923,945	\$5,339,249	\$10,678,499	\$5,373,963	\$16,121,561	\$32,243,781

Source: IMPLAN, MFALLC

Summary and Conclusion

The Pullman story is the American story, representing the intersection of the industrial revolution, railway industry, architecture and planning, labor, and African-American history. This south side Chicago neighborhood is struggling economically, but Chicago, as a whole, is healthy with a strong visitor base upon which to build. There are a plethora of strong community organizations in and around Pullman, and the community has attractive elements that should be of interest to the broader public.

MFA and the Client made assumptions regarding the operations of a potential Pullman National Historical Park, and based on the factors above, estimated the likely visitation to the Park. If programmed well, Pullman should be able to leverage existing visitation patterns and be quite successful. Some key elements to this plan may include:

- Value of the NPS designation
- Renovation and interpretive programming of one or more key structures
- Expand beyond the “historic site” market into the “museum” market for higher interest levels
- Partnerships / coordination with existing touring groups / concessionaires in the Loop
- Leverage significant community support and soon to be rising economic activity from new nearby shopping center
- Tell all the layers of the Pullman story to ensure a broad appeal and to cross-pollinate interest groups

These activities on the part of NPS would have a positive impact on the community by providing a catalyst and support for ongoing efforts. The end result would be real jobs, good wages and increased economic activity and business growth associated with a new NPS unit.

Table 19. Summary of Assumptions and Estimated Economic Impacts

	Baseline	Short Term	Mid Term	Long Term
Development Projects (NPS and Others)	Hotel Florence	Administration Building	North Wing Rear Shops Hotel Upstairs	Firehouse Market Square Hotel Annex
Assumed Operational Budget		\$350,000		\$3,500,000
Assumed Staffing Levels		2-3		25-35
Estimated Visitation	50,000	150,000	300,000	300,000
Jobs (Direct, Indirect, Induced)				
Short-Term Construction	*	62	157	83
Annual From Operations	5	5	49	49
Annual From Visitation	51	153	307	307
Total** Jobs	56	220	513	439
Wages (000) (Direct, Indirect, Induced)				
Short-Term Construction	*	\$3,888	\$17,407	\$5,181
Annual From Operations	\$242	\$242	\$2,420	\$2,420
Annual From Visitation	\$2,075	\$6,224	\$12,449	\$12,449
Total** Wages	\$2,317	\$10,354	\$32,276	\$20,050
Output (000) (Direct, Indirect, Induced)				
Short-Term Construction	*	\$9,740	\$43,606	\$12,977
Annual From Operations	\$682	\$682	\$6,818	\$6,818
Annual From Visitation	\$5,374	\$16,122	\$32,244	\$32,244
Total** Output	\$6,056	\$26,544	\$82,668	\$52,039

* Assumed project in place - not attributed to NPS designation

**Total combines short-term construction impacts with annual ongoing operational and visitation impacts. Use this figure with caution.

Source: IMPLAN, MFALLC

Addenda

Why a National Historical Park?

NPS, as an agency, began in 1916 and assumed ownership and management of sites from predecessor agencies. The agency currently manages about 88 million acres, 27,000 historic structures, and 21,000 buildings. NPS has an annual budget of approximately \$3 billion and has 280 million visits annually.

Within this land inventory, there are numerous designations and programs. There are 401 “units” with 20 different designations, and those designations vary by purpose as well as by the method of NPS acquiring the property. Sometimes the differentiation in designation is minimal or technical, blurring the distinction between, for example, National Historic Sites (“NHS”) and National Historical Parks (“NHP”).

There are also “affiliated areas” that are categorized the same way as units, but are not operated in the same manner. For these properties, NPS provides technical assistance, but does not own the property. For example, there are two National Historic Sites in Illinois. The Lincoln Home in Springfield, Illinois is owned and operated by NPS as a unit. In contrast, the 90-acre Chicago Portage National Historic Site is an Affiliated Area owned by the Forest Preserve District. (The Ronald Reagan Boyhood Home in Dixon, Illinois, almost became a third National Historic Site in Illinois in 1981. The purchase from the non-profit Ronald Reagan Boyhood Home Foundation was authorized, but the deal fell out due to the appraisal.)

Units in the National Park System, regardless of designation, are expected to meet four standards:

1. It is an outstanding example of a particular type of resource.
2. It possesses exceptional value or quality in illustrating or interpreting the natural or cultural themes of our Nation's heritage.
3. It offers superlative opportunities for recreation, for public use and enjoyment, or for scientific study.
4. It retains a high degree of integrity as a true, accurate, and relatively unspoiled example of the resource.

In short, NPS units are to be the “best”, “first”, or “only”.

A summary of the units and affiliates by major designation is provided in the following table.

Table 20. National Park System: 2013

Designation	Units	Affiliated
National Park (some co-located with Preserves)	59	
National Preserve / Reserve	20	
National Monument	79	
National Historical Park (proposed for Pullman)	46	
National Historic Site / International Historic Site	79	11
National Battlefield Park / Military Park / Battlefield / Battlefield Site	25	
National Memorial	28	5
National Recreation Area	18	
National Seashore / Lakeshore / River	29	
National Parkway / Trail	7	
Other	11	
Total	401	16

Source: National Park Service

The National Historical Park designation is proposed for Pullman, and so the relationship between that definition and some of the other designations is helpful in understanding what will likely happen with that designation.

- National Historical Parks are based more on historical resources and less on natural resources than National Parks. Therefore they tend to be less oriented toward outdoor recreation and can be in urban settings.
- National Historical Parks are generally more complicated than National Historic Sites are. The term “complexity” is not easily defined in this context, and therefore there may be similarities

between these two designations. Typically NHS sites are all owned by the Federal Government, whereas the NHP may be only partially owned.

- Similarly, National Monuments preserve a single unique cultural or natural feature, and are not necessarily historic, but many are.
- War related sites are sometimes historic and sometimes have natural features, and therefore have overlap with National Historical Parks.

Other NPS Designations

There are other designations and properties that involve NPS, even though they are not official units of the bureau. Pullman is already designated as both a National Historic Landmark and National Historic District, and therefore is on the National Register of Historic Places, all defined below. The additional programming related to the designation as a National Historical Park designation would build on these existing programs.

National Historic Landmarks are designated by the Secretary of the Interior as having national significance in terms of history or culture. There are about 2,500 currently in the US. There are also National Historic Landmark Districts, which are to National Historic Landmarks as National Historical Parks are to National Historic Sites.

National Heritage Areas are designated by Congress to encourage preservation. There are currently about 50 such areas, which are administered by the states, private companies or non-profit organizations. NPS provides technical assistance, and sometimes limited funding to these areas.

National Register of Historic Places is the “official list of the Nation’s historic places worth of preservation.” This list is administered by NPS, and includes over 80,000 individually listed properties. Additionally, there are over 1 million properties affected by the program. There is a National Register of Historic Districts, incorporating supporting areas and structures not individually listed. Additionally, all National Historical Park, National Historic Sites, and National Historic Landmarks are automatically added to the register. A key element of the National Register is the Historic Preservation Tax Credit program, administered by NPS. Under this program, certain cost of qualified renovation projects can be credited against Federal income tax liabilities. Owners or developers of these projects can syndicate these credits to investors who otherwise would have tax liabilities, as a means to raise capital.

Selected Impact Definitions

Direct Impact

Direct impacts are the changes in sales, income and jobs in those business or agencies that directly receive revenues from the project or program. For example, the economic activity of a construction company renovating the project would be a direct impact.

Indirect Impact

Indirect impacts are the changes in sales, income and jobs in those business or agencies that supply the business or agencies receiving direct impacts. For example, if a steel fabrication plant in the impact area produces the steel that is sold to the construction company, the economic activity at the steel fabrication plant is an indirect impact.

Induced Impact

Induced impacts measure ripple effects of wages in the local economy. As employees are paid by the businesses and agencies directly or indirectly impacted, there is an increase in household income, which is then spent, at least in part, in the impact area. For example, if the employees of the construction company and steel fabrication plant purchase groceries in the community, the sales at the grocery store are induced impacts.

Value Added

Value Added is the total output less the cost of intermediate inputs. Intermediate inputs include the consumption of goods and services either purchased from other industries or imported. Value added consists of compensation of employees, taxes on production and imports less subsidies and gross operating surplus

Output

Output represents the value of industry production. These are annual production estimates for the year of the data set and are in producer prices. Output is the sum of intermediate purchases (purchases of products consumed in production) and Value Added

Employment

This is the number of jobs supported by spending through a policy, program, project, activity or event. Aggregated job estimates are presented in the context of “full-time equivalent” positions. In the disaggregated data, partial jobs may be shown and could represent increased hours or labor productivity depending on firm-by-firm staffing decisions.

Labor Income

All forms of employment income are included; both employee compensation (wages and benefits) and proprietor income.

Taxes

This refers to the tax revenue contribution of the development to local, state and federal units of government. This assumes current tax policy that is in place. These figures could change depending on special incentives, programs, or rebates associated with the project that is being assessed.

Multiplier Effect

The “multiplier effect” is used to determine the impact of each dollar entering, impacting and eventually leaving a defined economy (i.e. “dollar turnover”). This results in increased production and expenditures, employment creation and attraction, and retention of new residents, businesses and investments. The “multiplier effect” is added to the final demand that is the estimate of the level of spending in the local economy by the private or public sector, to obtain total economic impact, the sum of direct, indirect and induced impacts. The multiplier effect is usually estimated by utilizing the Regional Input/Output Model multipliers as developed by the U.S. Department of Commerce.

Selected NPS Unit Profiles

Boston African American National Historic Site

Location: 46 Joy St.
Boston, Massachusetts

Acres: 1.6 mile trail

Authorized: 1980

Admission: Free
Partner Museum - \$3/\$5

Hours: Summer: Daily
Fall & Spring: Mo-Sa

Budget: \$785,000 (2012)

Staffing: 8 FTE (2010)

Census-10 mi: 1,714,997 (2010)



Structures: This unit consists of the 1.6-mile Black Heritage Trail through parts of Beacon Hill, the largest pre-Civil-War African American neighborhood. The tour starts at the Robert Gould Shaw Memorial, owned by the City of Boston, and ends at the African Meeting House owned by the non-profit Museum of African American History. The African Meeting House underwent a 2011 renovation of \$9.5 million, and charges \$5 for adults and \$3 for children and seniors. There are 15 historic buildings along this route, most privately owned. NPS does not own any of the structures along the route.

2011 Impacts:	Recreation Visits	Overnight Stays	All Visitor Spending (\$000s)	Non-Local Visitor Spending (\$000s)	# Jobs	Labor Income (\$000s)	Value Added (\$000s)
	379,906	0	\$26,145	\$24,310	298	\$11,936	\$19,788

History: The unit highlights colonial New England’s African Americans from colonial times through the 1800s and honors non-blacks who supported their causes. This neighborhood, on the north slope of Beacon Hill, was home to about half of Boston’s 2,000 African Americans. After 1806, Boston blacks had come to Beacon Hill to the new African Baptist Church at the African Meeting House to hear Rev. Thomas Paul. The Meeting House hosted a school, community groups, musical performances, and antislavery meetings. During the Civil War, black Bostonians formed the core of the 54th Massachusetts Regiment. After the war, Boston’s black population increased from fewer than 2,500 in 1860 to nearly 12,000 by 1900, due to the northward movement of blacks from the south.

Program: Ranger-led and self-guided tours are available. A partner institution, the Museum of African American History, offers interpretive displays at the African Meeting House.

Nearby: The route connects to the Freedom Trail, which is part of the Boston National Historical Park. The Freedom Trail connects sites associated with the Revolutionary war in the area. The differentiation of these two units may not be completely evident to the public and there is likely a large overlap in visitors. Boston National Historical Park has about 2.5 million visitors annually.

Lessons: It is possible to have a virtual park with limited real estate assets and yet draw significant visitation. Histories can be connected and multi-faceted, as shown by the connection between the revolutionary storyline and the African American heritage.

Lincoln Home National Historic Site

Location: 426 S. Seventh St.
Springfield, Illinois

Acres: 12.2

Opened: 1887 - donated to state
1971 - NPS acquired

Admission: Free

Hours: 8:30-5:30, daily

Budget: \$2.808M (2012)

Staffing: 35 FTE

Census-10 mi: 173,077



Structures: The Site is centered on the 12-room home of Abraham Lincoln, where he lived with his family for 17 years before he became president. The main house was constructed in 1839 and was renovated in 1988 to its 1860's appearance. In addition to Lincoln's home, the Site consists of several exhibits in a four-block area in downtown Springfield, including the Dean House and Arnold House.

2011 Impacts:

Recreation Visits	Overnight Stays	All Visitor Spending (\$000s)	Non-Local Visitor Spending (\$000s)	# Jobs	Labor Income (\$000s)	Value Added (\$000s)
296,214	0	\$16,367	\$16,061	233	\$6,006	\$11,410

History: Abraham Lincoln was one of the most well-known and pivotal presidents in the United State, serving during the Civil War in the 1860s. He was assassinated just after the war ended and after he was reelected for a second term. Prior to being President, he was a lawyer and politician, first in the Illinois General Assembly, and then in the US Congress.

Program: There is a visitor center with a gift shop. Tours of the home are available every 15-20 minutes for groups of up to 15 people, and last 20-25 minutes. The site offers a film covering the history and walking tours, including cell-phone tours, of the area. There is an active Junior Ranger program, as well as a recently established Underground Railroad program at the site.

Nearby: The site is synergistic with other nearby State-owned attractions like the Lincoln Library, Lincoln Museum, Lincoln's tomb, and New Salem a few miles away. Annual visitation at these attractions is about 450,000 annually. Additionally, the State Capitol and other governmental buildings are nearby.

Lessons: Lincoln's home is currently the only NPS facility in the State of Illinois. The site is located in an urban area, albeit one smaller than Chicago, and is focused on a structure with a story. The African-American experience here is an overlapping narrative with Pullman. The NPS economic impact analysis does not credit the site with overnight visitors, although the site undoubtedly is a stop on the itinerary of numerous out-of-town guests like Pullman will be. MFA expects that Pullman, if similarly programmed, would also become a stop on Chicago visitors' itineraries. School groups are a notable component of the visitation.

New Orleans Jazz National Historical Park

Location: 916 N. Peters St.
New Orleans LA 70116

Acres: 5.1

Authorized: October 31, 1994

Admission: Free

Hours: 9:00-5:00 Tu-Su
Perseverance Hall: 9:00-5:00 Sa

Budget: \$1.282M (2012)

Staffing: 12 FTE (2010)

Census-10 mi: 729,743



Structures: Perseverance Hall No. 4 in Louis Armstrong Park is the main structure of the New Orleans Jazz NHP. This former Masonic Lodge was built between 1819 and 1820, making it the oldest Masonic temple in Louisiana. The park is officially situated in the Tremé neighborhood across the street from the French Quarter, but there is a visitors' center in the French Market and programming occurs at the Old U.S. Mint, located at the edge of the French Quarter along the Mississippi River.

2011 Impacts:	Recreation Visits	Overnight Stays	All Visitor Spending (\$000s)	Non-Local Visitor Spending (\$000s)	# Jobs	Labor Income (\$000s)	Value Added (\$000s)
	130,393	0	\$6,903	\$6,418	20	\$3,190	\$5,180

History: In the 19th century, New Orleans drew immigrants from literally around the world, melding their customs, rituals, and music with those of the Creoles and Spanish residents, creating the roots of American jazz. From that came New Orleans' unique culture and history and its role as the primary jazz center in the world.

Program: The park hosts jazz concerts at the Old U.S. Mint and other venues in the French Quarter, as well as educational programming, jazz recordings, and experience-oriented elements. The jazz museum on the second floor of the Mint is part of the Louisiana State Museum and is often visited in tandem with the NHP concerts. Park Rangers are also musicians who often give concerts. Park offers two jazz history audio tours – the Jazz Walk of Fame tour and the jazz history tour. Interviews from the site's oral history project are kept at Tulane University's Jazz Center.

Lessons: This park is located in the heart of the tourist district of New Orleans, not tucked away in a neighborhood. Visitation grew very slowly at first, but has increased rapidly in the past few years, now topping 170,000 visits (up from 131,000 in 2011). There is a limited physical presence, but a significant programming initiative. This is another park that operates in partnership with a state agency.

Harpers Ferry National Historical Park

Location: 171 Shoreline Dr.
Harpers Ferry WV 25425

Acres: 2,504

Authorized: 1944

Admission: Vehicle pass: \$10
Individual pass: \$5

Hours: 8:00-5:00 Daily

Budget: \$6.712M (2012)

Staffing: 92 FTE (2010)

Census-10 mi: 75,529 (2010)



Structures: The US Armory and Arsenal was built in 1799. All told, there are some 25 historic buildings and exhibits, with shuttles available to move people around the site. Points of interest include: John Brown's Fort; Arsenal Square; Jefferson Rock/Harper Cemetery; blacksmith shop; Stipes' boarding house, White Hall Tavern, and Storer College, one of the earliest integrated colleges and one of the first to educate former slaves. Exhibits cover the 1862 Battle of Harpers Ferry, the Civil War, the Confederacy, Black Voices, and Meriwether Lewis.

2011 Impacts:

Recreation Visits	Overnight Stays	All Visitor Spending (\$000s)	Non-Local Visitor Spending (\$000s)	# Jobs	Labor Income (\$000s)	Value Added (\$000s)
255,348	0	\$9,993	\$9,117	135	\$3,963	\$6,955

History: The site thrived as an industrial center for a half century, but was destroyed by the Union at the beginning of the Civil War to prevent capture by Confederacy. In 1833, the Chesapeake & Ohio Canal connected Harpers Ferry and Washington, D.C. A year later, the B & O Railroad began train service.

One of the site's most famous events is John Brown's raid on the armory and arsenal. He intended to capture weaponry for slaves and freedom fighters. The raid was put down and Brown was executed, but this was arguably the beginning of the struggle for civil rights. Other historic events include key firearms manufacturing technology and the first structural steel bridge, a rail line crossing of the Potomac, and the largest surrender of Federal troops during the Civil War.

Program: In addition to visiting the individual buildings and exhibits of Harpers Ferry, visitors can choose from 20 miles of mapped hiking trails that vary from strolls to four-mile hikes across battlefields to eight-mile treks to mountaintops. Living History Workshops are available on topics from industrial revolution history to 19th century knitting techniques to blacksmithing. Picnicking and camping facilities are available as well.

Lessons: Several of the stories are similar to those in Pullman, particularly the overlap of our industrial past with race relations. This is a well-established park and much larger than Pullman. Visits topped one million in the 1970s, but for the last decade have hovered between 250,000 and 300,000. The budget and staffing is significant compared with other parks with this visitation.

Indiana Dunes National Lakeshore

Location: 1100 North Mineral Springs Road
Porter IN 46304

Acres: 15,314

Authorized: 1966

Admission: Summer West Beach – free
Summer: \$6/car \$30/bus
Camping: \$15/day

Beach Hours: Summer: 8:00-6:00
Winter: 8:30-4:30

Budget: \$9.086M (2012)

Staffing: 125 FTE (2010)

Census-10 mi: 145,536 (2010)



Structures: The Indiana Dunes National Lakeshore includes 15 miles of Lake Michigan shoreline, with beaches, dunes, oak savannas, swamps, bogs, marshes, prairies, rivers, and forests. It has camping facilities and hiking trails, including on Mount Baldy, the tallest moving sand dune at Indiana Dunes; an Environmental Learning Center; historical Chellberg Farm and farm house; architect-designed houses moved to the site from the 1933 Worlds Fair in Chicago.

2011 Impacts:

Recreation Visits	Overnight Stays	All Visitor Spending (\$000s)	Non-Local Visitor Spending (\$000s)	# Jobs	Labor Income (\$000s)	Value Added (\$000s)
1,840,513	22,823	\$58,817	\$41,251	572	\$13,892	\$24,596

History: Although the Indiana Dunes National Lakeshore wasn't authorized until 1966, as far back as 1916 (only a year after the establishment of the National Park Service), environmentalists called to preserve a portion of the Indiana Dunes, keeping it safe from the encroachment of industry and other uses along the Lake Michigan shore. Indiana Dunes State Park opened in 1926. As threats to the dunes and the Great Marsh continued, activists appealed to conservationists throughout the country for funds to buy dunes land. Both President John Kennedy, who supported the authorization of both the Cape Cod National Seashore and the Indiana Dunes National Lakeshore, and Illinois Senator Paul Douglas were pivotal in creating the National Lakeshore, with 8,330 acres. Four subsequent expansions brought the park to its current 15,000 acres,

Program: Environmental Learning Center; five 1933 Worlds Fair Houses; special events such as the Maple Sugar Time Festival in March at the Chellberg Farm and Bailly Homestead, created by one of the first homesteading families in Indiana. The Indiana Dunes Learning Center is a program provided by a park provide in NPS-owned structures. It offers curriculum-based service learning programs for both elementary and high school students.

Lessons: This profile is not a comparison for Pullman, but is included for informational purposes because it is the next closest NPS unit. Pullman's designation would be based on historical structures and events, while Indiana Dunes is primarily a natural resource park.

Lowell Massachusetts National Historical Park

Location: 67 Kirk Street
Lowell, MA 01852-1029

Acres: 137

Opened: 1979

Admission: Some free
Some charge admission

Hours: Various hours for
individual park
components

Budget: \$8.347M (2012)

Staffing: 86 FTE (2010)

Census-10 mi: 501,579 (2010)



Structures: The Lowell NHP is comprised of a group of preserved and adaptively reused water-powered textile mills built during the Industrial Revolution along the 5.6-mile integrated canal system, which was once the largest power generating canal in the U.S. Structures include the Tsongas Industrial History Center, the Boott Cotton Mills Museum, along the Merrimack River, the American Textile History Museum, the Patrick J. Morgan Cultural Center, Pawtucket Dam and Gatehouse, Suffolk Mill Turbine and Powerhouse, Mill Girls and Immigrants Boardinghouse, University of Massachusetts Center for Lowell History and a Visitor Center. The infrastructure is the Lowell Canal System and Swamp Locks, the Merrimack River and the Northern Canal Walkway.

2011 Impacts:	Recreation Visits	Overnight Stays	All Visitor Spending (\$000s)	Non-Local Visitor Spending (\$000s)	# Jobs	Labor Income (\$000s)	Value Added (\$000s)
	520,452	0	\$235,818	\$33,303	408	\$16,351	\$27,109

History: As the first planned industrial city in the U.S., Lowell is considered the birthplace of the American urban working class. Its water-powered textile mills represent the beginning of the Industrial Revolution in New England. Lowell's textile mills were built as an answer to the cramped facilities in English mills communities. Both immigrants from abroad and migrants within New England and Quebec came to Lowell to work in the mills. Young women made up a significant portion of the workforce. Lowell was called the "Venice of the United States" due to its technologically advanced canal system.

Program: To visit the many sites that make up the Lowell Historical Park, visitors can ride on historic replica trolleys, take canal boat cruises or walk along the Riverwalk or Canalway. Several unrestored mill sites are visible along the river. There are music performance and series available to visitors, especially during the summer.

Lessons: Lowell offers a template for many of the vision components for Pullman, including the overlap of planning, industry, and specific ethnic histories. NPS only owns key elements of the Park, and yet coordinates and programs with other local partner agencies. MFA assumes that Pullman will have a smaller operational budget and staffing levels, due in part to the relative scale of the park.

Martin Luther King, Jr., National Historic Site

Location: 450 Auburn Ave., NE
Atlanta, GA 30312-0526

Acres: 38.66

Established: October 10, 1980

Admission: Free

Hours: Daily.
Summer: 9am to 6pm
Winter: 9am to 5pm

Budget: \$4.11M (2012)

Staffing: 36 FTE (2010)

Census-10 mi: 862,154 (2010)



Structures: The site is comprised of 35 structures, including Martin Luther King’s childhood home, Ebenezer Baptist Church where he preached, the Martin Luther King, Jr., Center for Nonviolent Social Change; the tomb of Dr. King and his wife Coretta; a visitors center; Fire Station No. 6 built in 1894; and a statue of Ghandi from the Indian Council for Cultural Relations located on the International Civil Rights Walk Of Fame.

2011 Impacts:	Recreation Visits	Overnight Stays	All Visitor Spending (\$000s)	Non-Local Visitor Spending (\$000s)	# Jobs	Labor Income (\$000s)	Value Added (\$000s)
	666,482	0	45,868	42,647	562	21,142	33,915

History: Dr. King was born in 1929 and raised in the Sweet Auburn neighborhood of Atlanta. King graduated from Morehouse College in 1948 and the same year was ordained at Ebenezer Baptist Church. Dr. King came to national attention when, after Rosa Parks' famous refusal to move to the back of a bus in Montgomery, he led the 381-day Montgomery Bus Boycott from in 1955-56. Dr. King served as president of the Southern Christian Leadership Conference (SCLC), and continued as the primary civil rights leader in the US until his 1968 assassination in Memphis, where he was supporting striking sanitation workers. Among his most famous moments was his speech in 1963 during the March on Washington and winning the Nobel Peace Prize.

Program: Most of the park is self-guided, except for the birth home, which requires a free ticket for a Ranger-guided tour. The typical visit is between 1.5 and 2 hours to visit the individual sites.

Lessons: Like Pullman, Sweet Auburn is a historic neighborhood within a large city, although it is more accessible to the local tourist flow than Pullman is. MFA anticipates that the program would be similar including number of stops and interpretive experience. Dr. King was a more notable figure in US history than George Pullman was. Given these factors, It is likely that Pullman would draw a fraction of the visits that MLK NHS does.

Paterson Great Falls National Historical Park

Location: 72 McBride Ave.
Paterson NJ 07501

Acres: 36

Authorized: March 30, 2009
Established: November 7, 2011

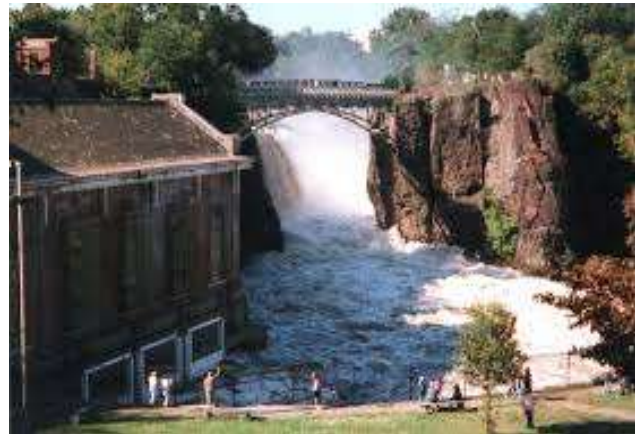
Admission: Free

Hours: 10:00-4:00 Tu-Fri
12:30-4:30 Sa-Su

Budget: \$350,000 (2012)

Staffing: 2 FTE

Census-10 mi: 1,407,947 (2010)



Structures: The Paterson Great Falls National Historical Park is still in planning stages, and the Great Falls of the Passaic River is currently the only official national park “structure.” All properties that will become part of the national park are owned by other entities, and park planners are in an acquisition phase. All elements that will become part of the National Historical Park are in a contiguous landscape around the Great Falls.

History: The Great Falls of the Passaic River is located within the city limits of Paterson, making for a unique opportunity for recreation and natural beauty in the midst of a city. The Great Falls Park has been a City of Paterson park for many decades.

One of the largest waterfalls in the US, the Great Falls’ significant role in early industrial development has earned it several designations in addition to its newest one as a National Historical Park. The Falls are the central component of the Great Falls of Paterson-Garret Mountain National Natural Landmark, and it has been a National Historic Landmark District since 1976. The Great Falls’ raceway and power systems were designated a Historic Civil Engineering Landmark in 1977.

The City of Paterson traces its role as a significant industrial center back to Alexander Hamilton who, as early as 1792, saw the potential of the Great Falls to be the power generator of an industrial boom like the British industrial revolution going on at the time. Hamilton and the Society for Establishing Useful Manufacturers helped to stimulate Paterson’s growth as a major manufacturing center. Cotton milling, locomotives, textiles, weaving, silk spinning, and dyeing were some industries Paterson became known for.

Program: The Park has no official sites, exhibits or tours as yet. Much of the past few years has been devoted to planning for the new national park, including meeting with experts and local constituencies in visioning sessions on how the natural features and the history of the Falls might work together to create a compelling visitor experience.

Lessons: Like Pullman, this Historical Park is being created out of an existing historical area that has functioned as a specific kind of place within a city for many years. It is likely that the initial operations of Pullman will be similar to those of Paterson.

Rosie the Riveter World War II Home Front National Historical Park

Location: 1414 Harbour Way S, Ste 3000
Richmond, CA 94804

Acres: 145.19

Dedicated: 2000

Admission: Free

Hours: 10:00-5:00, Daily
Memorial/Park - daylight
Ship – Tu, Sa, Su

Budget: \$1.299M (2012)

Staffing: 13 FTE (2010)

Census-10 mi: 587,211 (2010)



Structures: Only some elements are currently open to the public: the Rosie the Riveter Memorial (sculpture representing mass assembly and ship building); Sheridan Observation Point; the S.S. *Red Oak Victor*, (last remaining “Victory Ship” built in the Richmond Kaiser Shipyards); the Shimada Friendship Park; and the Visitor Education Center in an historic Ford plant. When completed, the Park will include original shipyard employee living quarters and a World War II Home Front Education Center. Sites are connected by portions of the San Francisco Bay Trail.

History: During WWII, 90,000 people from all parts of the country came to Richmond, a town of 20,000 to work in over 50 war industries. At the height of the war, women made up approximately 27% of the Richmond shipyard workforce, challenging traditional ideas of “women’s work” while producing 747 ships, more than any other US complex. Over 6 million women worked in industrial jobs across the US at that time. As such, women in overalls wielding tools became a national patriotic icon popularized in a 1942 song. The Rosie the Riveter NHP was created to educate and commemorate these contributions.

Program: The park was conceived as a partnership park, with NPS as a partner to area land owners including the City of Richmond and several non-profit and private entities. With multiple access points, multiple partners, and no primary visitor center until last year, the Park has limited visitor data. (Park interpreters logged a total of 14,778 visitor contacts in 2009.) Home Front Festivals by the Bay have been held in the fall. New permanent exhibits will open at the visitor center in spring 2014. Park rangers give tours of the site and of the Visitor Education Center. The Richmond Museum of History gives tours of the SS Red Oak Victory, currently being restored.

Lessons: The unit is an amalgamation of sites owned by various entities, similar to the vision for Pullman and several other sites. This approach has taken more time and limited the amount of data available for assessment. The Visitor Center is opening over a decade after the park was established.

If data were available, the park might provide a key insight regarding placement within a metropolitan area. Richmond, like Pullman, is not central to the tourist patterns of the broader metropolitan area. As such, it is unlikely to draw 4.2 million visitors like the San Francisco Maritime National Historical Park, which is located at Fisherman’s’ Wharf, does.

Thomas Edison National Historical Park

Location: 211 Main St
West Orange, NJ 07052

Acres: 21.25

Opened: 1956 - Home
1962 - Site

Admission: \$7 (good for 7 days)

Hours: Lab - 9:00-5:00, W-Sa
Estate - 11:30-5:00, F, Sa, Su

Budget: \$2.87 million (2012)

Staffing: 32 FTE (2010)

Census-10 mi: 1,876,204 (2010)



Structures: The Laboratory Complex includes 14 historic structures, six of which were built in 1887 as the first laboratory dedicated to the “business of inventing.” The property reopened in 2009 after extensive renovations. Many rooms contain their original furnishings. A replica of the world’s first motion picture studio, the “Black Maria,” is also part of the Thomas Edison National Historic Park. More than 400,000 artifacts are preserved here, including prototype and commercial Edison products, laboratory furnishings and equipment, and personal items. The Edison home at Glenmont is a 29-room mansion built in 1880 and surrounded by 15 acres of landscaped grounds, a greenhouse, barn and stables, and a garage made of Edison poured concrete.

2011 Impacts:

Recreation Visits	Overnight Stays	All Visitor Spending (\$000s)	Non-Local Visitor Spending (\$000s)	# Jobs	Labor Income (\$000s)	Value Added (\$000s)
55,284	0	\$3,805	\$3,538	40	\$1,830	\$3024

History: Both Thomas Edison’s laboratory and residence preserve the legacy of the famous and prolific inventor. This is the last of his laboratories, where he perfected the phonograph, motion pictures, the nickel-iron alkaline storage battery, and many other groundbreaking inventions.

Program: There is an “Invention Factory” orientation film at the Laboratory Complex. Ranger-led programs such as a demonstration of Edison’s phonograph, an informational talk and detailed look at the Black Maria (Edison’s motion picture studio prototype); the 1903 silent film “The Great Train Robbery”; and tours of the Main Laboratory Building and the Chemistry Lab. At Glenmont, the Edison home, tours of both the house and the grounds are available.

Lessons: Thomas Edison is a well-known and key part of the Industrial Revolution. Visitation to the site is lower than at most of the other comparable sites.

Firm Description

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