



Mosteller Garage Proposal

Opinion Survey

Sigma-2 Associates, Inc.
July 2006

Borough of West Chester
Mosteller Garage Proposal Opinion Survey

Table of Contents

Background and Methodology.....2

Executive Summary..... 4

Results

 Project Ratings..... 6

 Ratings Summary.....16

 Liked Most • Liked Least..... 17

 Respondent Demographics..... 19

Verbatim Responses

 Zukin Realty, Inc. • Buchart Horn/Basco.....21

 RedGo Development.....26

 Astra Development Group LLC • Bernardon Haber Holloway Architects PC..... 29

 Teres Holdings, LLC • PIATT Associates, Inc. • John Milner Architects, Inc.....32

 Issues for future presentations..... 36

 Tabulation and Ranking of Issues..... 39

 Demographic reference to Verbatim Responses.....40

Opinion Survey Cover Letter.....43

Questionnaire.....Appendix

Detailed Tabulations and completed Questionnaires
are available at the Borough Manager’s Office

Mosteller Garage Proposal Opinion Survey

Background and Methodology

Background

This Mosteller Garage Proposal Survey was conducted in conjunction with a public meeting which took place on July 13, 2006, at the Chester County Historical Society. The purpose of the meeting was the presentation of project proposals for the construction and operation of new buildings at the current site of the Borough-owned Mosteller Garage.

The meeting was a joint project of the Borough of West Chester Council and the West Chester Business Improvement District (BID) and was publicized in advance via email, radio and a feature story in the Daily Local News. Attendance at the meeting was approximately 230, including members of Borough Council, the BID, the various developers and the general public.

During the meeting, moderated by Malcolm Johnstone, BID Executive Director, each of four prospective development companies was given 45 minutes to present its proposal.

- The Zukin Realty, Astra Development Group, and Teres Holdings presentations each included a hotel development, identified as a priority objective for downtown West Chester by the BID.
- The Zukin presentation involved currently-owned properties on Gay Street plus the Borough-owned garage.
- RedGo Development presented a mixed-use residential/retail concept involving the site of both the Mosteller Garage and the site of the present YMCA building directly across from the garage on Chestnut Street.
- The Astra and Teres presentations involved only the garage site.

Following the presentations, the developers responded to several pre-submitted audience questions.

Objectives

The main objective of this survey was to gather public opinion on the proposals for the development of the Mosteller Garage property.

Specific objectives were to...

- Provide attendee ratings of each proposal on a list of ten different factors.
- Determine which proposals were most favored and least favored by attendees.
- Solicit detailed attendee comments about the individual proposals.

Methodology

To meet these objectives, Borough Council members requested a formal survey questionnaire be developed so meeting attendees could respond to the ideas presented.

Sigma-2 Associates, Inc., a West Chester-based market research firm with 25 years of experience in survey research, assisted in the development of the questionnaire and provided tabulation and reporting of results.

A survey questionnaire (see appendix) was drafted by Sigma-2 under the supervision of and with input from members of Borough Council. This two-page questionnaire was printed by the Borough Manager's office and then given to each meeting attendee at the entry door. Each questionnaire was individually hand-numbered to reduce the potential for tampering.

Attendees were asked to complete and return the questionnaires to Ernie McNeely, Borough Manager, either at the end of the meeting or via mail by June 20, 2006. A total of 230 questionnaires were distributed and 75 completed questionnaires were returned by the deadline. The raw completion rate for the survey is thus 32.6%. However, it

Mosteller Garage Proposal Opinion Survey

Background and Methodology

should be noted that a number of attendees left the meeting early and did not complete the survey.

Sigma-2 edited and entered all data from the completed surveys into a custom database. These data were then cross tabulated according to total respondents, Borough residency, business involvement and other factors. A copy of this detailed tabulation report is available at the Borough Manager's office. This summary report is based on the tabulation report and also includes full verbatim responses from all survey respondents.

Mosteller Garage Proposal Opinion Survey

Executive Summary

Respondent Ratings of Mosteller Garage Proposals

Participants in this survey were asked for their opinions on four project proposals presented by different developers, to be built on the site of the Mosteller Garage in West Chester. In addition to demographic questions about Borough residency and business involvement, three key questions asked respondents to...

- Indicate how strongly they agreed or disagreed with a series of ten statements about each project.
- Choose the projects they liked most and liked least.
- Provide general comments on each project.

This report provides detailed results for each question. Below is a short overview for each project proposal, in the order presented on July 13, 2006.

Zukin Realty, Inc.

There was significant polarization of opinion about the project presented by Zukin Realty, Inc. On one hand, it was rated highest or tied for highest for a few statements, including “use of green technology,” “handles parking requirements” and having “a positive contribution to the town’s tax base.” On the other hand it was rated lowest of all projects for appropriateness of height and for overall size/footprint. For all other statements, Zukin’s ratings were second-highest.

This polarization was evident when respondents selected their favorite projects. Zukin was selected as “liked most” by about one in six people, but over twice as many selected it as “liked least.”

Respondent comments about the Zukin project also were strongly divided pro and con, as seen by the following from two different respondents...

- Daring, real mixed use—though he’ll have to watch the hotel nameplate—strong local team—lots at stake. Probably best bang for taxes and economic benefit.

- Project is too large; it is not appropriate to downtown West Chester; it will negatively impact the Borough’s character.

RedGo Development

On average, the RedGo Development project was rated moderately by respondents. Compared to the other projects, it was most competitive in terms of handling parking requirements and contributing to the town’s tax base. This project received the lowest average scores in the survey for such factors as “use of green technology,” being the “best way for our town to grow,” and for fitting a “vision of the town’s future.”

Very few people chose the RedGo Development project as the one they liked most, while almost a third chose it as the one they liked least.

Based on respondent comments, most of the dislike for the RedGo project seemed centered on the fact it would require demolishing the current YMCA facility to replace it with a new garage. A typical comment was...

- Disliked destruction of YMCA—loss of vital community service. Facilitates YMCA’s abandonment of West Chester.

Astra Development Group LLC

The project presented by Astra Development Group LLC was also rated moderately by most respondents for most of the survey statements. This project’s average agree/disagree ratings all hovered around “neutral.” The best results were in terms of overall size/footprint and for “a positive contribution to the town’s tax base.” The project was rated

Mosteller Garage Proposal Opinion Survey

Executive Summary

relatively low for “the best way for the town to grow,” for fitting the respondents’ “vision of the town’s future,” and for preserving “a sense of community.”

The Astra project was selected by the lowest number of respondents as the one they liked most, but it was also selected by very few as the one they liked least.

While there were a few positive and negative comments about the Astra project, in general, the respondents seemed to feel it did not do enough or was not creative enough. As one typical statement said...

- Seems very ordinary. Too similar to other recent buildings. Lacks character.

Teres Holding, LLC

The Teres Holding LLC project proposal was a clear favorite for most respondents.

Overall, more respondents agreed positively about the various statements related to the Teres project. Teres had an especially high degree of support for the appropriateness of the project’s height and size, for preserving “the town’s sense of community,” having “a positive impact on the community,” being “the best way for our town to grow,” as “needed in the town center” and for filling “a need that fits my own vision of the town’s future.”

Teres was selected as “liked most” by the majority of respondents. Remarkably, not a single respondent selected this project as least-liked.

This favorable impression was also backed up by many respondent comments about the Teres project, typified by the following...

- After listening to these people, I trust them to design and build a project that would be a “home run” for the Borough; at 75 feet, the hotel does not offend. The parking designs are interesting and the stacked parking which allows for twenty-four condos was especially appealing. The Teres Holdings proposal is so far superior to the others that I would be greatly disappointed if the Borough did not choose this group. The design architect and the consulting architect were both very impressive.

Demographic Differences

Borough of West Chester residents responding to the survey were more inclined to rate the Teres project highly and select it as the one they liked most than were nonresidents. In contrast, Borough residents were less inclined to select any of the other projects as their favorite. These differences of opinion were also greater among long-term residents.

For instance, on the subject of having an appropriate height or skyline, approximately three-quarters of long-term Borough residents agreed with this statement for the Teres project and only 4% agreed with it for the Zukin project.

Other Considerations

The results presented in this report and in the separate detailed tabulation report to some extent mask the degree of support some of the projects have among at least a few respondents. This was particularly true of the Zukin project. Although only 13 respondents selected this as the project they liked most, 11 of these said they “agree strongly” with every statement about the Zukin project and a number of them did not rate the other projects at all.

There was also a small degree of misunderstanding about how to rate the statements with five respondents giving very high “agree” ratings for projects which they then selected as the ones they liked least. These obviously inconsistent ratings were entered as “no answers” in order to avoid biasing the results.

Mosteller Garage Proposal Opinion Survey

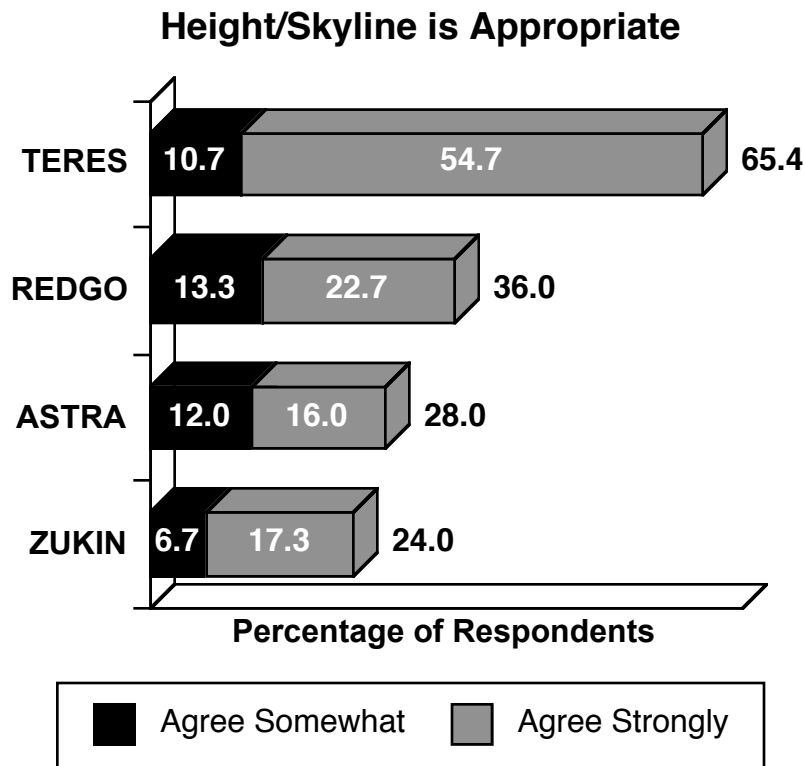
Project Ratings

For each project presented, respondents were asked how much they agreed or disagreed with a series of ten statements on a scale of 1 to 5 (with a rating of 1 indicating “Disagree Strongly” and a rating of 5 indicating “Agree Strongly”). Full details of these ratings are provided in the separate Detailed Tabulations report and a summary of all average ratings is provided later in this section.

However, a comparison of just the respondents who agree with each statement for each project gives a clear picture of general respondent attitudes. The following graphs are therefore based only on those respondents who agree somewhat or agree strongly with the statements.

Height/Skyline

Almost two thirds (65.4%) of respondents agree the height or skyline of the Teres project is appropriate. The majority (54.7%) agree strongly with this statement about Teres. For all other projects, only a minority of respondents agree with this statement, with the Zukin project receiving the lowest proportion (24%).



The differences were even greater among the 25 respondents who have lived in the Borough for 15 or more years:

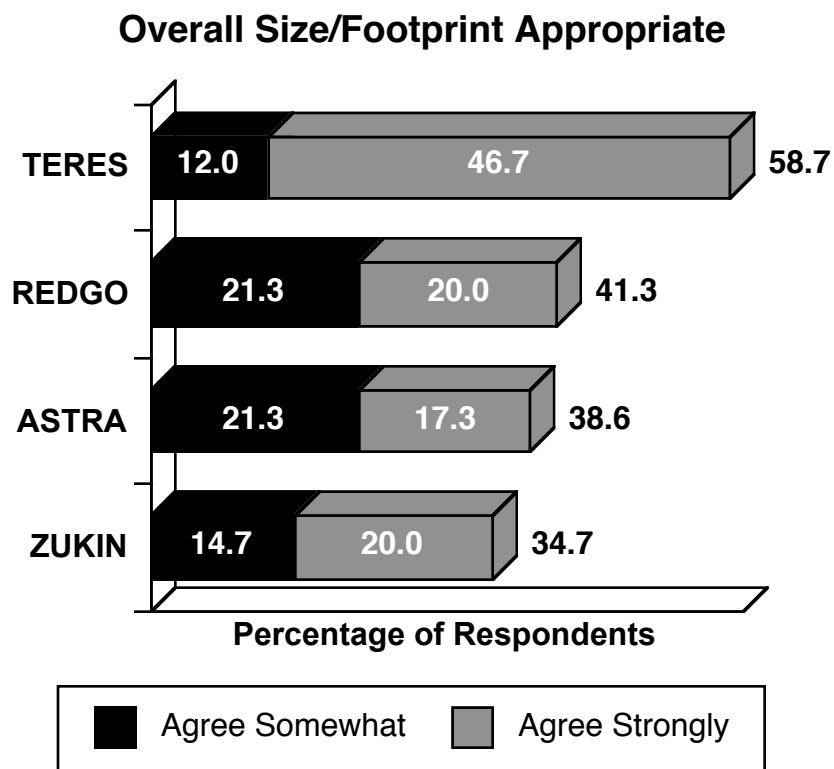
- 4% agree with it for the Zukin project.
- 76% agree with the above statement about the Teres project.

Mosteller Garage Proposal Opinion Survey

Project Ratings

Overall Size/Footprint

Asked if the overall size or footprint of the project was appropriate, the majority of respondents (58.7%) agreed with this statement for only the Teres project (58.7%) with almost half (46.7%) agreeing strongly. The results for the other projects were somewhat closer than for the statement about height or skyline, with the Zukin project receiving the fewest positive ratings (34.7%).



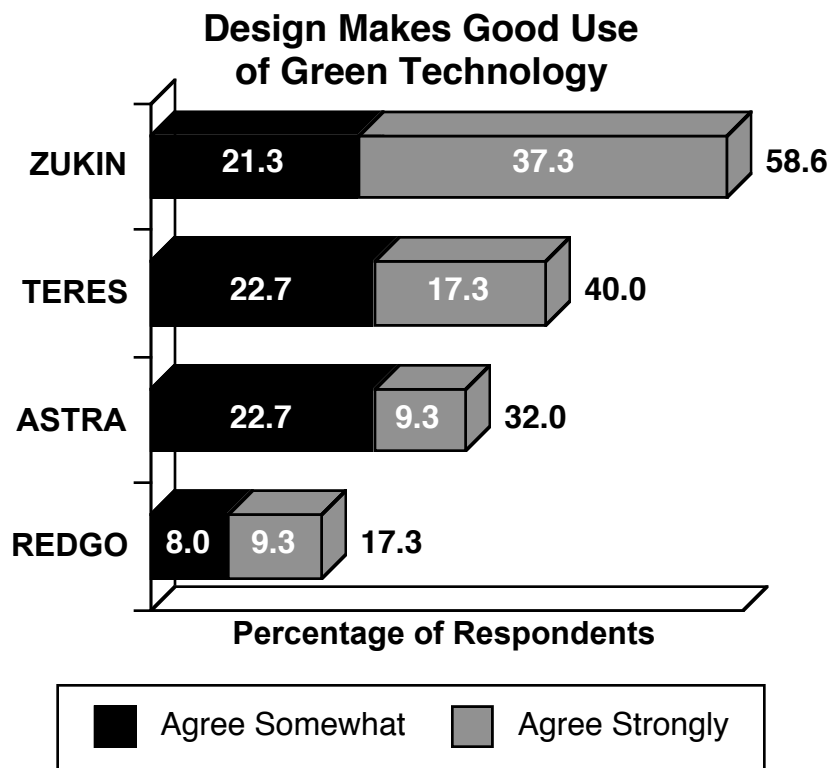
Again, 76% of long-term residents agree with the above statement for the Teres project.

Mosteller Garage Proposal Opinion Survey

Project Ratings

Green Technology

In terms of the design making good use of green technology, the Zukin project was rated highest on this statement, with the majority (58.6%) agreeing with the statement. The RedGo project had the least support on this statement, with only 17.3% agreeing. The Teres and Astra projects each received agreement from a minority of respondents.



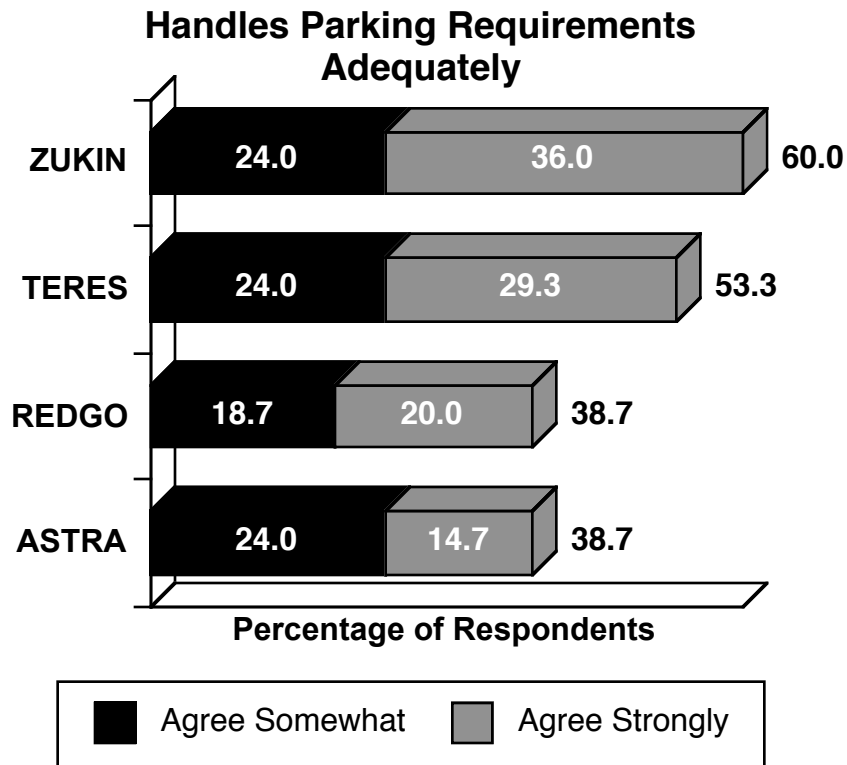
Mosteller Garage Proposal Opinion Survey

Project Ratings

Parking Requirements

The Zukin project also received high marks from respondents for adequately handling parking requirements, with three out of five (60%) agreeing it does. A smaller majority (53.3%) also agreed with this statement for the Teres project.

The RedGo and Astra projects were supported on this statement by identical proportions of respondents (38.7%).



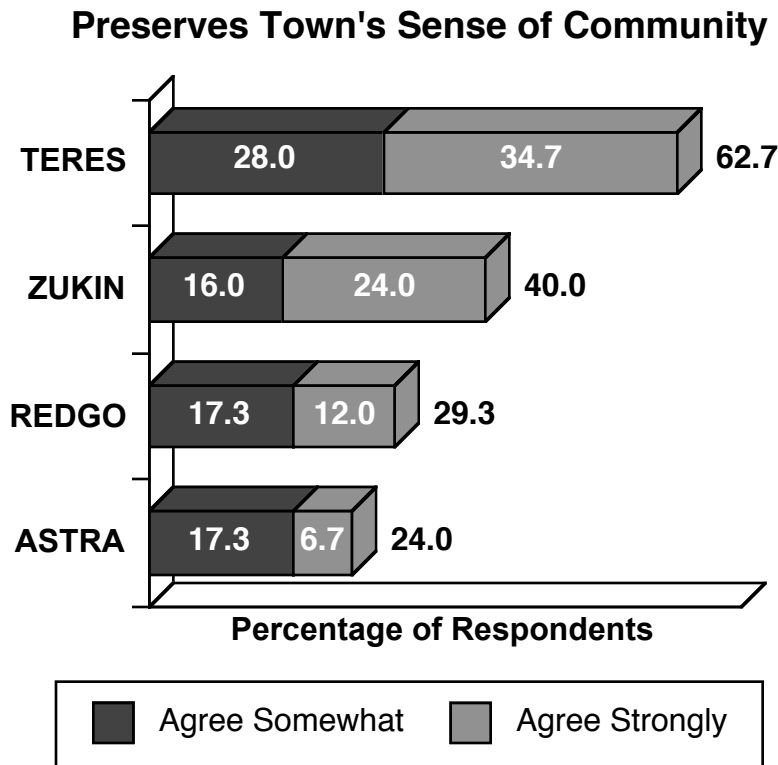
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Project Ratings

Preserves Sense of Community

Most respondents showed a clear preference in terms of preserving the town's sense of community, with more than three of five (62.7%) agreeing with this statement about the Teres project, including over a third (34.7%) who agreed strongly. The Zukin project also receives substantial support, but from a minority of respondents (40%).

In contrast, only small proportions of respondents agree with this statement about the RedGo and Astra projects.



Although not shown in the graph above, it may be significant to note that only 5 out of the 75 total respondents (6.7%) disagreed with this statement about the Teres project.

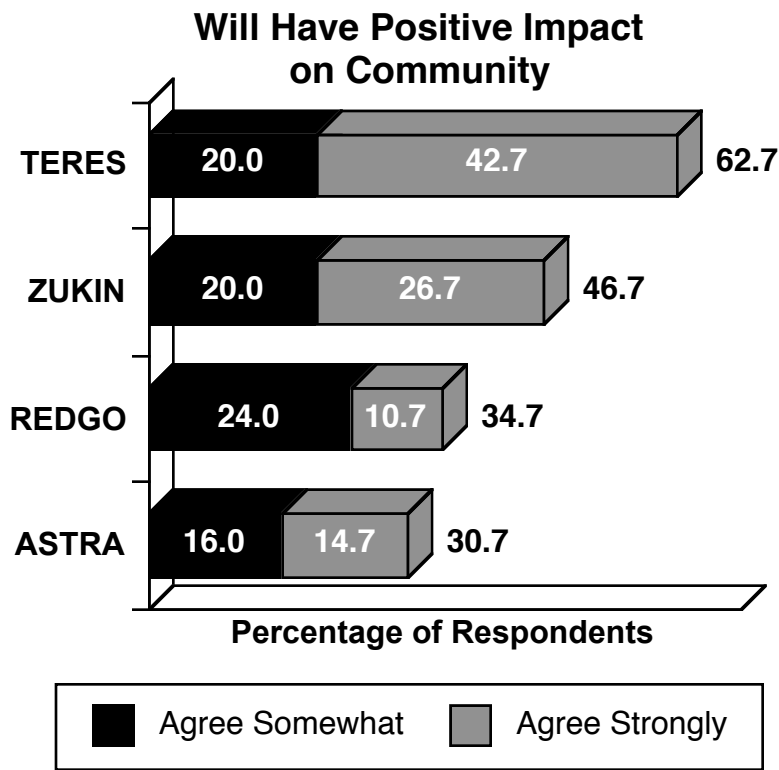
Mosteller Garage Proposal Opinion Survey

Project Ratings

Positive Impact on Community

The Teres project was also seen by a majority (62.7%) as having a positive impact on the community. Almost half (46.7%) agreed with this statement about the Zukin project.

About one in three (34.7% and 30.7%) agree the RedGo or Astra projects will have a positive impact.



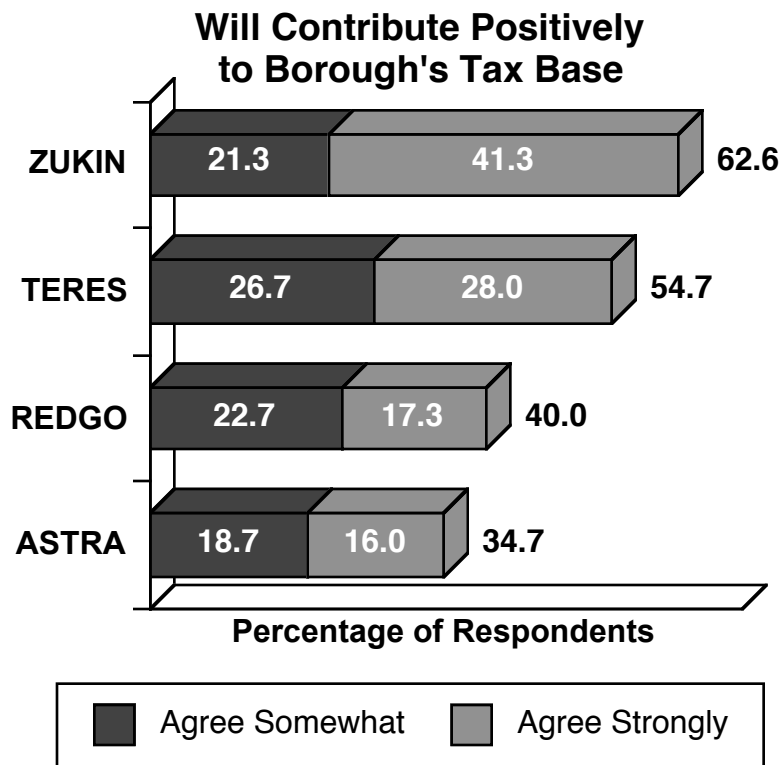
Mosteller Garage Proposal Opinion Survey

Project Ratings

Contributes to Tax Base

The Zukin project received its strongest support on the statement that it will contribute positively to the Borough's tax base. More than three out of five (62.6%) agree with this statement for the Zukin project, while only 9 out of all 75 respondents (12%) disagree. Teres is also seen by a majority (54.7%) as contributing positively to the tax base.

Again, the RedGo and Astra projects received support from minorities of respondents.

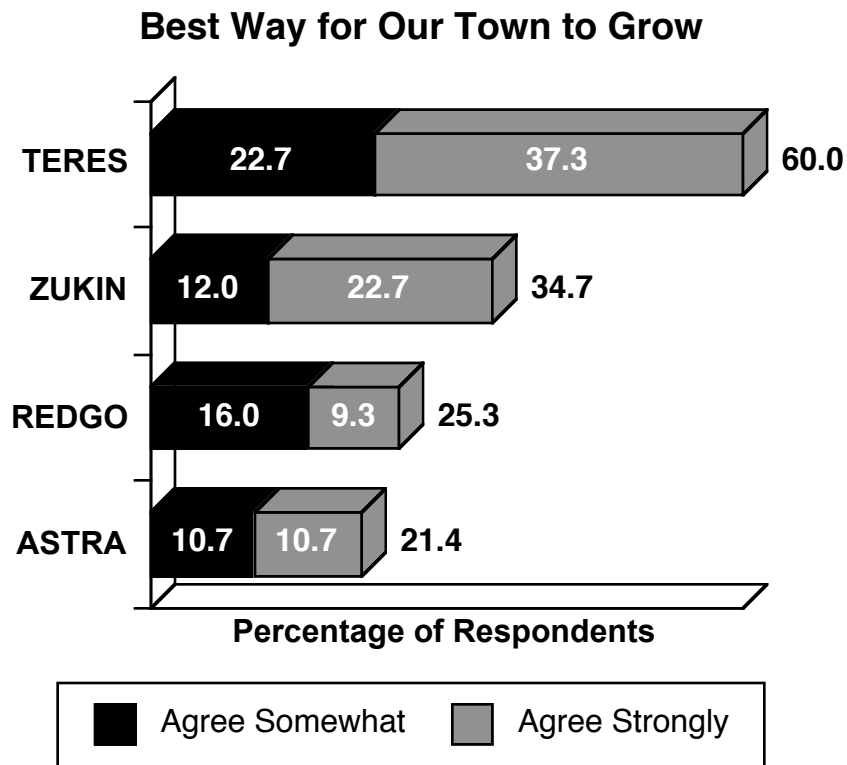


Mosteller Garage Proposal Opinion Survey

Project Ratings

Best Way to Grow

The Teres project is the only one receiving majority support (60%) on the statement that it is the best way for our town to grow.



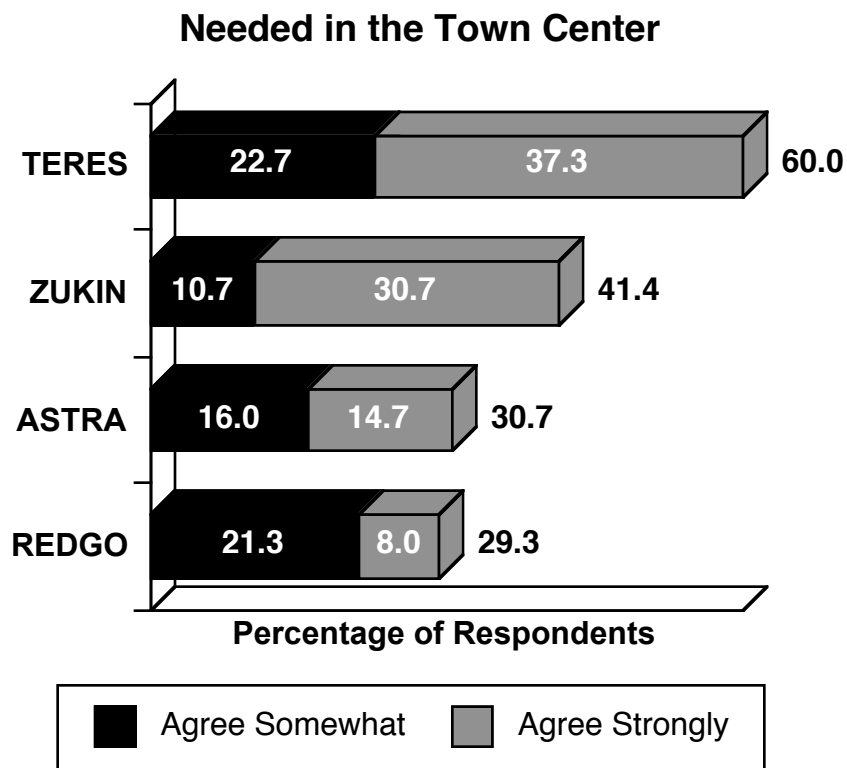
Although not shown in this graph, only three respondents (4%) disagree strongly with this statement about Teres, compared to more than one third (34.7%) who disagree strongly with it in regard to the Zukin project

Mosteller Garage Proposal Opinion Survey

Project Ratings

Needed in Town Center

Three in five (60%) agree the Teres project is “needed in the town center.” Again, minorities of respondents support the other projects on this statement. The RedGo project not only receives the lowest total support, but only 8% agree strongly with this statement for RedGo.



On this statement, the Zukin project receives somewhat more support among respondents who own or manage a business in the Borough, with 46.1% of this group agreeing.

Mosteller Garage Proposal Opinion Survey

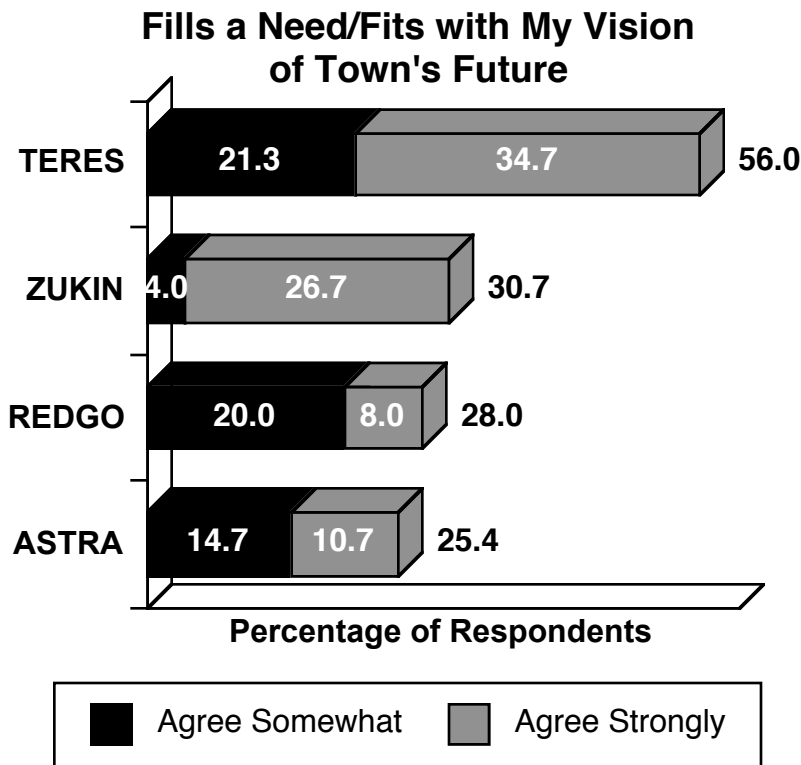
Project Ratings

Vision of Town's Future

The Teres project is the only one which the majority of respondents (56%) agrees “Fills a need that fits with my own vision of the town’s future.” Over a third (34.7%) agree strongly with this statement about Teres.

Meanwhile, although a large proportion (26.7%) agree strongly with this statement about Zukin, there is substantial polarization, with even more (34.7%) disagreeing.

RedGo and Astra received even weaker support for this statement.



Mosteller Garage Proposal Opinion Survey

Project Ratings

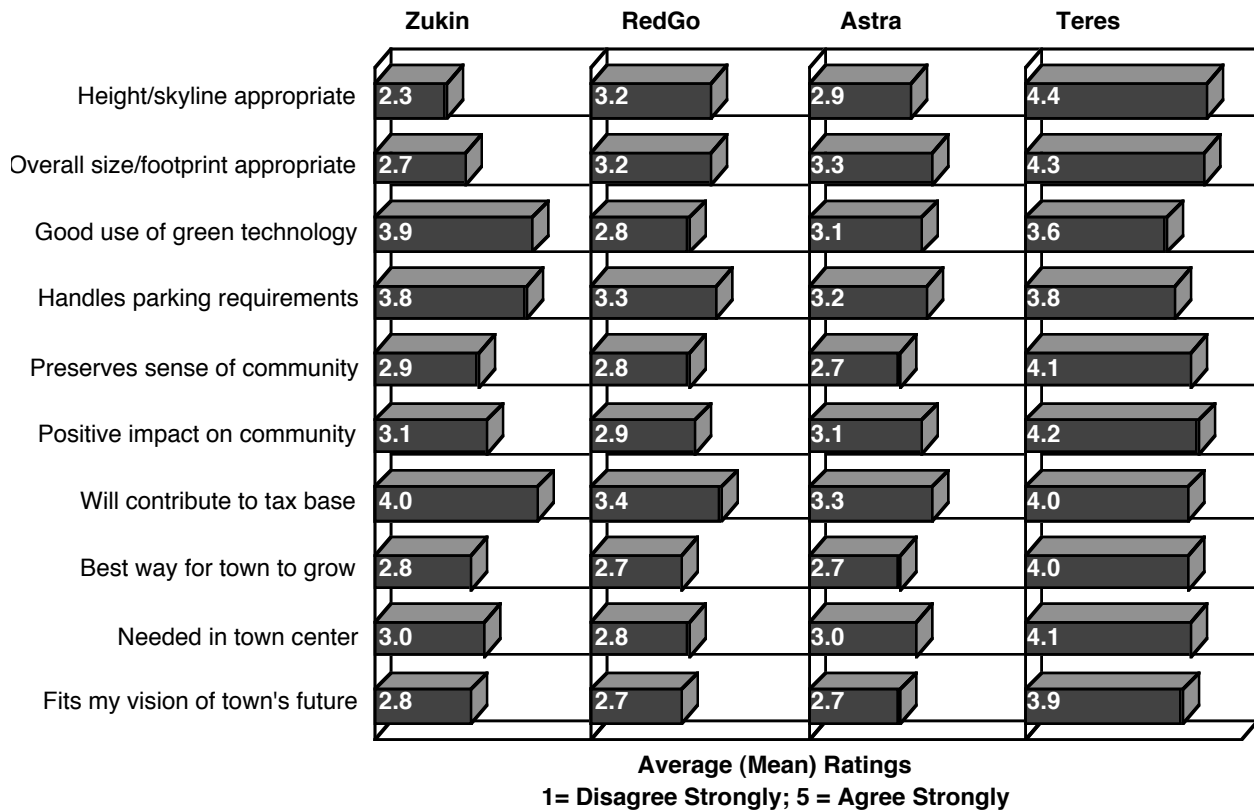
Ratings Summary

The graph below summarizes the average (mean) rating for every project and every statement. The worst possible score is 1.0 (disagree strongly) and the best possible score is 5.0 (agree strongly). This makes comparisons much easier.

For instance, scanning down the first column, it is easy to see that the Zukin project stands out mostly on the statements related to green technology, parking requirements and the tax base. In the last column, support for Teres can be seen as strong for almost every statement, but particularly in terms of height and overall size.

Scanning across the rows of the graph, you can see that support for the Zukin project is marginally higher only for the statement about green technology. The Zukin project's average rating is also tied with the Teres project on the parking requirements and tax base statements. The Teres project has substantially greater support for all other factors studied.

The RedGo and Astra projects were rated neutrally on almost every statement, with averages ranging from 2.7 through 3.4.



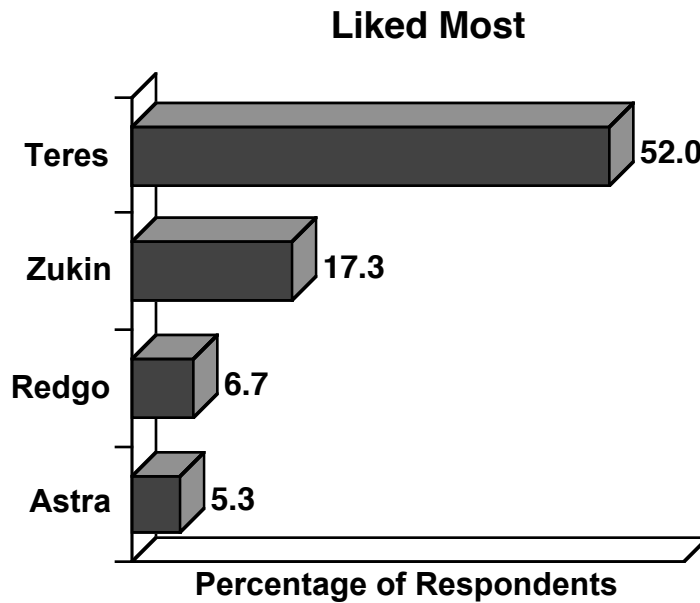
Mosteller Garage Proposal Opinion Survey

Projects Liked Most and Least

Project Liked Most

Asked to select the project they liked most, over half selected the Teres project, with only the Zukin project receiving any other substantial support (17.3%). Very small proportions selected the RedGo and Astra projects.

Further, among Borough residents a larger proportion liked the Teres project (63.2%) and a smaller proportion liked the Zukin project (10.5%).



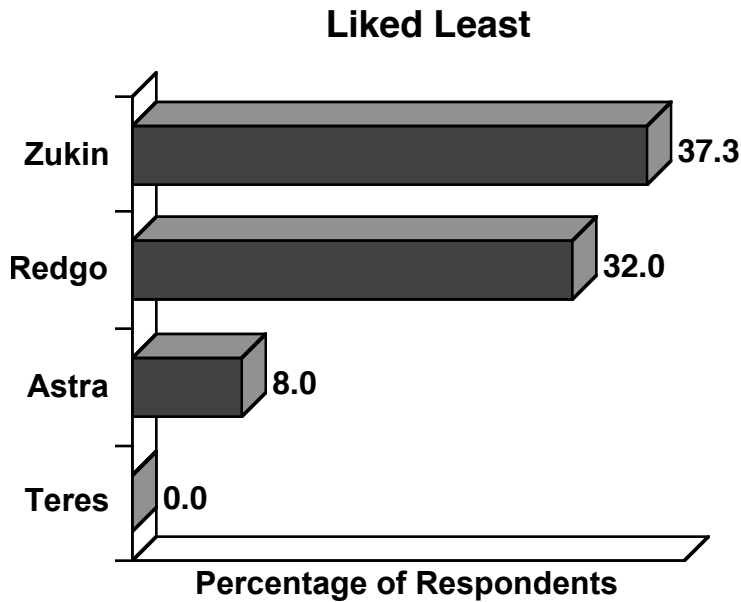
Mosteller Garage Proposal Opinion Survey

Projects Liked Most and Least

Project Liked Least

When asked which project they liked least, almost equal proportions selected the Zukin project (37.3%) and the RedGo project (32%).

The Astra project received very few mentions, but it was liked least by a few more respondents than liked it most. Remarkably, not one of the 75 respondents selected Teres as the project they liked least.



Mosteller Garage Proposal Opinion Survey

Respondent Demographics

Residency/Business Ownership

Respondents to this survey are mostly Borough of West Chester residents, either owning (68%) or renting (9.3%) their primary residence. A total of 36% own or manage a business in the Borough. About one in six (16%) neither live in the Borough nor own/manage a Borough business.

West Chester Residency/ Business	
	Percent
Own primary residence	68.0
Rent primary residence	9.3
Own or manage rental property	16.0
Own or manage retail establishment	8.0
Own or manage restaurant or bar	4.0
Own or manage other business	13.3
None of the above	14.7
No Answer	1.3
BASE (75 Total Respondents)	100.0

Adds to more than 100% due to multiple responses

If none of the above, indicate other:

ID Response

- 7 Lived in Borough 35 years, but moved out to town's edge due to college students and lack of food stores.
- 13 Westtown. Lived in Borough for 40 years.
- 21 Area businessman.
- 22 East Bradford–16 years. West Chester–two years before that.
- 28 S. Concord Road, 23 years.
- 36 East Bradford
- 38 Malvern
- 43 Work in West Chester full time for four years.
- 52 Chester County resident.
- 60 Manage local Senate office.
- 61 Work in Borough.

Mosteller Garage Proposal Opinion Survey

Respondent Demographics

Borough Location

More than a third of the the respondents are from Ward 1, the Northeast section of the Borough. This is not surprising, since these surveys were handed out at a meeting in the Chester County Historical Society, also located in Ward 1. The remaining respondents are almost equally distributed throughout the other Borough wards.

If you live here, which Ward?	
	Percent
Ward 1	35.1
Ward 2	10.5
Ward 3	12.3
Ward 4	10.5
Ward 5	10.5
Ward 6	8.8
Ward 7	7.0
No Answer	5.3
BASE (57 Borough Residents)	100.0

Length of Residency

Of those respondents living in the Borough, most have been here for 11 or more years. The average (mean) for all Borough residents responding is 17.7 years.

If you live in West Chester Borough, how long?	
	Percent
5 Years or Less	21.1
6 - 10 Years	19.3
11 - 20 Years	26.3
More than 20 Years	29.8
No Answer	3.5
Average (Mean Years)	17.7
BASE (57 Borough Residents)	100.0