

TC 558-06 George Brooks House Inn  
Rezoning 487

MSA. S. 1829-6101

Comments 10/2/10  
Foot  
year

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*Governor*

Michael S. Steele  
*Lt. Governor*



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*Executive Director*

**STATE OF MARYLAND  
CRITICAL AREA COMMISSION  
CHESAPEAKE AND ATLANTIC COASTAL BAYS**

1804 West Street, Suite 100, Annapolis, Maryland 21401  
(410) 260-3460 Fax: (410) 974-5338  
[www.dnr.state.md.us/criticalarea/](http://www.dnr.state.md.us/criticalarea/)

October 2, 2006

Ms. Mary Kay Verdery  
Talbot County Office of Planning and Zoning  
11 N. Washington Street  
Courthouse  
Easton, Maryland 21601

Re: George Brooks House Inn  
TM 23, Parcel 41

Dear Ms. Verdery:

Thank you for providing information on the above referenced site plan and growth allocation request. The applicant is proposing to convert 1.99 acres within a Resource Conservation Area (RCA) to a Limited Development Area (LDA) for the purpose of expanding and renovating an existing bed and breakfast. The property acreage totals 8.5 acres, with 4.251 acres located within the Critical Area.

Based on the information provided, it appears that the applicant proposes renovations of the existing structures as well as the future addition of a parking area for approximately twelve vehicles, the conversion of an existing studio and workshop into poolside villas for use as guest rooms, and the construction a two-story, 1,440 square foot spa building. It is my understanding that the growth allocation request is necessary because the County's zoning ordinance classifies the proposed facility with the proposed number of guest rooms as a hotel. In general, hotels are not a permitted use within the RCA.

The information provided to this office to date fails to detail both the amount of existing impervious surface area and the proposed amount of future impervious areas. Therefore, it is not possible to assess whether the designation of LDA will be sufficient, or whether an Intensely Developed Area (IDA) designation will be necessary. For an LDA designation to be sufficient, the applicant must demonstrate that the 15% impervious surface area limit will not be exceeded, as well as demonstrate compliance with all other criteria for development within the LDA. In addition, the applicant has stated the intention to convert only 1.99 acres within the Critical Area from an RCA to an LDA. The use of growth allocation for only a portion of the site, thereby leaving an area of less than twenty acres as RCA, would be inconsistent with both the Commission's previous approvals of similar requests and the Commission's growth allocation policy. It appears that the entirety of the 4.251 acres within the Critical Area will need to be deducted.

Mary Kay Verdery  
George Brooks House  
October 2, 2006  
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We acknowledge that the applicant's proposal for growth allocation has yet to be heard before the County Planning Commission. As such, these comments are provided as preliminary in nature. It will be necessary to forward additional information to Commission staff regarding the site plan details, including an environmental assessment and a formal growth allocation request should the growth allocation be approved locally.

As you know, provisions of the Critical Area Law were amended this spring through the adoption of Senate Bill 751. The legislature clarified the authority of the Commission and Chairman regarding program changes including growth allocation. The Bill includes language requiring the Commission to ensure that the locational guidelines for growth allocation have been applied in a manner that is consistent with the purpose, policies, goals, and provisions of the Critical Area law, as well as all criteria of the Commission. It is important that the County review this legislation to ensure that the local review process addresses the locational guidelines and that appropriate documentation is provided to the Commission as part of the County's formal growth allocation submittal.

Thank you for the opportunity to provide comment at this early stage of the growth allocation process. Please include this letter in your file and submit it as part of the record for this request. If you have any questions, please contact me at 410-260-3482.

Sincerely,



Kerrie L. Gallo  
Natural Resources Planner  
TC558-06

**Gallo, Kerrie**

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**From:** Debbie Moore [dmoore@talbgov.org]  
**Sent:** Tuesday, September 26, 2006 2:27 PM  
**To:** Gallo, Kerrie  
**Subject:** RE: George Brooks House Inn

Kerrie, the Historic Commission is meeting on this tomorrow again. I will know something further on it then. Also, the P.C. meeting for this is not until Oct. 4 to consider the Growth Allocation, so I will let you know after that, what the outcome is.

*Debbie Moore*

Talbot County Planning & Zoning  
 28712 Glebe Road, Ste. 2  
 Easton, MD 21601  
[dmoore@talbgov.org](mailto:dmoore@talbgov.org)  
 410-770-8037

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**From:** Gallo, Kerrie [mailto:KGallo@dnr.state.md.us]  
**Sent:** Tuesday, September 26, 2006 1:01 PM  
**To:** Elisa Deflaux  
**Cc:** Debbie Moore  
**Subject:** RE: George Brooks House Inn

Any update on this? Thanks,

Kerrie

-----Original Message-----

**From:** Elisa Deflaux [mailto:edeflaux@talbgov.org]  
**Sent:** Tuesday, September 19, 2006 11:06 AM  
**To:** Gallo, Kerrie  
**Cc:** Debbie Moore  
**Subject:** RE: George Brooks House Inn

Will get back with you shortly. I think he made the request, and maybe you did not get it.  
 Thanks Elisa

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**From:** Gallo, Kerrie [mailto:KGallo@dnr.state.md.us]  
**Sent:** Tuesday, September 19, 2006 9:48 AM  
**To:** Elisa Deflaux  
**Subject:** RE: George Brooks House Inn

It came to us marked as a site plan review and growth allocation request, so I need to know if it really is a growth allocation request, either now or sometime down the line. Sounds like it is intended to be a growth allocation per Debbie's email. If it is simply a site plan review with no intention for growth allocation, that's fine too. I just need to know what you are submitting for review. Thanks,

9/26/2006

Kerrie

-----Original Message-----

**From:** Elisa Deflaux [mailto:edeflaux@talbgov.org]

**Sent:** Tuesday, September 19, 2006 9:34 AM

**To:** Gallo, Kerrie

**Subject:** RE: George Brooks House Inn

I am not sure what you were sent, but he is proposing to convert a Bed and Breakfast into a Historic Inn with Spa Services. What kind of info are you looking for. Thanks Elisa

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**From:** Gallo, Kerrie [mailto:KGallo@dnr.state.md.us]

**Sent:** Tuesday, September 19, 2006 9:33 AM

**To:** Elisa Deflaux

**Subject:** FW: George Brooks House Inn

Hi Elisa,

Per Debbie's email below, I have some follow-up questions. If this project is to be a growth allocation later down the line, I need to know what they will be proposing? I'm guessing to go from RCA to IDA? It matters because I don't want to comment on things that pertain to the RCA if you are intending to take this to an IDA. Obviously, we would need different information for an IDA. Thanks,

Kerrie

-----Original Message-----

**From:** Debbie Moore [mailto:dmoore@talbgov.org]

**Sent:** Tuesday, September 12, 2006 1:17 PM

**To:** Gallo, Kerrie

**Subject:** RE: George Brooks House Inn

Kerrie, he is going before the PC for site plan review and Growth Allocation request, for which a recommendation for the Growth Allocation must be sent to the County Council for their review process and vote. I guess you could go ahead and make a determination as far as the Growth Allocation and it would save time later. I don't remember if I sent you that information, did I. Did I clear it up for you?

*Debbie Moore*

Talbot County Planning & Zoning

28712 Glebe Road, Ste. 2

Easton, MD 21601

[dmoore@talbgov.org](mailto:dmoore@talbgov.org)

410-770-8037

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**From:** Gallo, Kerrie [mailto:KGallo@dnr.state.md.us]

**Sent:** Monday, September 11, 2006 4:20 PM

**To:** Mary Kay Verdery  
**Cc:** Debbie Moore  
**Subject:** George Brooks House Inn

Hi Mary Kay,

Can you please clarify the intention of this submittal to us at this stage? Looks like it might be a growth allocation down the line, but has not gone before planning commission or County Council? Is it just a site plan review right now? Thanks,

Kerrie

# Proposal for Expansion of the George Brooks House Inn Per the Requirements of Talbot County Bill # 979

Revised July 20, 2006

**Applicants:** Rolles Range Partners, LLC (Willard F. Workman, Jr and his son)  
24500 Rolles Range Road, St. Michaels, MD 21663  
Tax Map 23, Grid 14, Parcel 41  
Historic Overlay Zone (1.54 acres) created in September 2000  
Historic Property known as "the George Brooks House"

## Introduction

The George Brooks House Bed & Breakfast Inn sits on 8.5 acres of land zoned RC at the intersection of Rt. 33 and Rolles Range Road about a ½ mile North of the entrance to the Chesapeake Bay Maritime Museum in St. Michaels. My oldest son Willard III and I (Rolles Range Partners, LLC) acquired the property in late 1999. Our research during the fall of 1999 revealed that George M. Brooks and his wife Mamie were prominent members of the African-American community in Talbot County. We shared our research and old photographs plus the pamphlet entitled "Constructive Thinking" published by George Brooks in 1936 with the Historic Preservation Commission. The HPC paid a site visit to the property in January of 2000 and recommended to the Planning Commission and the County Council that approximately 2 acres be designated as an Historic Overlay Zone. On September 26, 2000 the Talbot County Council passed Bill # 797 to establish the George Brooks House as an historic site. During 2000 and 2001, the main house was rebuilt and expanded to accommodate 6 guest bedrooms for use as a B&B Inn. The carriage house with apartment above was built in 2000 and finished in 2001 and served as a staging area and workshop for the rehab of the main house. The Inn opened on December 7, 2001 and in 2002 the swimming pool, hot tub and gardens were completed.

In the summer of 2002, we discussed with the Planning and Zoning Director the need to expand the inn as six guest bedrooms were not sufficient to satisfy the debt service or provide a reasonable rate of return. At his suggestion, we sponsored a zoning text amendment to allow ten guest bedrooms for Historic B&B Inns in the RC Zone as permitted in the VC Zone. Bill # 894 cleared the Planning Commission in early 2003 and was forwarded to the County Council. During the review by the Planning Commission, they advised us that the proposed text amendment would only apply to existing structures and that we would need to build the accessory structures to qualify under the proposed zoning text amendment. We obtained building permits #02-895 and #02-896 in late 2002 to build a "studio" and "workshop" that would later be converted for use as guest bedrooms. These structures were built during 2003 and largely completed in 2004. Just before the County Council was to vote on our text amendment (Bill #894) in June of 2003, the bill was rewritten by someone brought in to assist the

county council on writing legislation. Without review by either myself (who sponsored the Bill) or the Planning Officer, the modified Bill #894 was presented to the County Council on the afternoon of June 24<sup>th</sup>. After a controversy arose over some of the provisions added to Bill # 894 by the legislative writer, the County Council voted unanimously to kill the Bill. In subsequent meetings with the County Manager, Planning Officer and County Attorney, an agreement was reached that a member of the County Council would introduce a new Bill which would address the need for special zoning for historic properties. This resulted in meetings with the Historic Preservation Commission Chairman (Mark Bower) along with the Planning and Zoning Office. The resulting Bill # 979 was introduced on July 18, 2005 and passed by unanimous vote on its first reading and became effective 60 days later. This proposal has been prepared in accordance with the provisions in Bill # 979 including the documentation required by Historic Preservation Specialists.

### **Historic Significance**

The George Brooks House is one of the largest African-American homes in Talbot County dating from the 1860's and early 20<sup>th</sup> century. George and Mamie Brooks purchased the property in 1900 from Andrew C. Barkman. The original two story frame house as shown on the 1877 Atlas of Talbot County was built for Andrew C. Barkman by "freed slaves" in the 1860's according to the oral history. In 1908, George Brooks added the two story Gothic Revival Section facing Rt. 33 and the stairs to the second floor and the attic had his signature "Geo. M. Brooks". He also added the porch roof and Gothic Revival Extension to the original frame structure facing Rolles Range Road (we found his hand lettered sign in the porch roof structure). Relatives of George Brooks had found and saved several of the pamphlets he had published in 1936 along with old photographs. This information was shared with the Historic Preservation Commission (Mark Bower) who wrote the following:

The "George Brooks House" is a typical late nineteenth century multiple gable vernacular farm house. The house is a style and form of late Gothic Revival found throughout the United States at the time of its construction. However, the building has local significance for its association with George M. Brooks, a prominent African American resident of St. Michaels in the late nineteenth and early twentieth centuries. Mr. Brooks was a leader of the African American community in the area and espoused the ideals of Booker T. Washington. Mr. Brooks was a prominent citizen of St. Michaels and a self made man and entrepreneur who was successful enough to own a substantial house well above the standard for African-American citizens of the County in the early twentieth century. He was outspoken in his views on race relations at a time when censure of this topic was the rule and he espoused his view in a treatise "Constructive Thinking" what he wrote and published at the height of the depression in 1936.



As you are aware, historic resources related to the African-American community are rare in Talbot County. The vast majority are no longer extant. For most of Talbot County's historical period, the African-American race was considered inferior and were subject to slavery and/or placed by rule or tradition in the lowest rung of society. Buildings and structures associated with the African-American community were most often built of poor materials resulting in loss over time to deterioration from the elements and demolition. In other instances, small traditionally African-American communities such as Bellevue still retain houses, churches and industrial buildings with strong ties to the history of the Black community. However, many of Bellevue's buildings have been so extensively altered that they no longer convey their historic association.

The George Brooks House, although long abandoned, retains a high level of historic integrity. The house has seen changes within the past fifty years, however, the majority of the exterior and interior detailing remain intact from the period of significance associated with the tenure of George Brooks.

Following the restoration and expansion of the George Brooks House during 2001, we received the prestigious "Heritage Award" from the Talbot County Historic Society at their annual meeting in May 2002 for the outstanding "reconstruction and adaptation" of this important historic building. In 2003, we were one of two homes in the State of Maryland to receive the "Preservation Award" from the Maryland Historic Trust. I was presented the award on May 2, 2003 in Easton which read; "for his role in the 2003 Preservation Project Award winning restoration of the George Brooks House in St. Michaels, Talbot County. The project required dedication and skilled craftsmanship. The restoration of the George Brooks House raises the standard for historic preservation efforts in Talbot County and is a model for others."

George M. Brooks and his wife Mamie were born in 1867 and died in 1954 and are buried in the old burial grounds of the Union Methodist Church behind "Big Al's" and the Brooks Lane townhouses. According to a relative, Bill Cole, and James "Sawdy" Thomas of St. Michaels, George M. Brooks started out as a waterman but found that he could make a better living as a farmer and by hauling tomatoes to the packinghouse and ice to the seafood plants. George was known in town for selling watermelons and peaches from his truck in the summer along with eggs from his chicken coop out at Rolles Range. George boasted that the Democrats had helped him when he needed a mortgage in 1900 to buy the "big house" on Rolles Range Road (George would reportedly admonish his fellow colored men with "what have the Republicans done for you since emancipation"), and later bragged that he owned the largest house of any colored man in Talbot County. His wife Mamie was a schoolteacher for many years at the one room "colored school" in St. Michaels. After George and Mamie bought the prominent house at Rolles Range Road from Andrew C. Barkman in March of 1900, they were faced with one of life's great challenges when George's sister Margaret

Brooks Johnson died in 1908 leaving 11 children (with the youngest girls only one and three years old). The father, Robert Johnson, was elderly and a civil war veteran and apparently not able to provide the housing and support for his 11 children. George expanded the house on Rolles Range to accommodate his new family - the Gothic Revival two-story section facing Rt. 33 was built by George along with three partitioned sleeping areas with dormer windows on the third floor. George became known as "Big Daddy" to his "adopted" 11 children and the "colored community" at large, and was referred to by his sister's grandson, Bill Cole as "Uncle Daddy". Although George Brooks only attended the "colored school" for one day, he managed at the age of 67 to write and publish in 1936 his treatise on "race relations" - at the height of the depression - which probably tells us much about what he believed in and what he felt was necessary for the "colored man" to succeed in Talbot County in those difficult years.

According to James "Sawdy" Thomas who grew up in St. Michaels and who knew George Brooks personally for over 15 years, George was a very prominent member of the "colored community" in this area and one of the most outspoken. He would often lecture his colleagues at Alfred Chester's barbershop (behind the Acme) on the need to work hard and achieve something for themselves. He was an active member of the Masonic Temple in Bellevue. George was very industrious but would often be found at Nichols gas station (now Big Al's) playing checkers with Grason Nichols. When George was in the prime of his life in the early 20<sup>th</sup> century, there were a number of black owned businesses and George was clearly one of the most prosperous. He often bragged to his fellow blacks that he owned the biggest house of any "colored man in Talbot County", and with indoor plumbing too! The restoration of the George Brooks House helps preserve this important "Black History" of St. Michaels, and what George accomplished in his life is a tribute to those who work hard and care about others.

### **Cost Structure for Rehab of Main Building**

The cost to restore historic buildings is uncertain at best. Many builders do not want to take on these restoration projects due to the problems encountered and the potential "cost surprises" the owner faces during the process. Trying to get fixed price bids for this type of construction is out of the question - be prepared for the worst as the house is taken apart! Then many decisions are faced on how "authentic" the restoration should be or how to implement the "Adaptive Reuse" of the building while preserving its historic character. We restored the old brick "Parsonage Inn" in St. Michaels during 1985 and learned a great deal about historic restoration and the difficult choices you face in this process. The George Brooks House represents our second major historic restoration project. Both of these projects convinced us of one common element - the house and its structural components are probably in worse condition than you can observe or even imagine - and you are likely to badly underestimate the total cost of doing a really first-class restoration.

The George Brooks House required a complete rebuild of the original structures including beam/floor joists and foundations. The 1908 Gothic Revival Section facing Rt. 33 was rebuilt in place retaining its original wood siding, exterior walls and roof structure. We paid careful attention to using materials like the original materials and retained interior moldings, doors, lock sets and white porcelain knobs for the restoration. We had to have custom milling done to reproduce the door and window moldings, "bulls-eye" corner blocks, and plinth blocks. The stair balusters, handrails and newel posts had been stolen by vandals along with the fireplace mantels. All of these components were custom milled from similar materials to restore the important architectural details of the house. The main roof was rebuilt using cedar shingles nailed to original battens or replacements. The lower pitch porch roofs were fabricated out of standing seam copper. Missing porch posts were custom turned to match the design or profile of the original posts. And the interior flooring was replaced with 3" and 5" yellow pine flooring similar to the random yellow pine floors that had rotten out. Most of this work was performed in 2001.

The cost structure for the restoration of the main house totaled \$570K including an advanced geothermal heating and cooling system. If we partition the cost between the original structures (historic rehab) and the additions, we have 1,770 square feet of finished space in the original sections and about 1,800 in the new additions. We were able to meet the county 50% limit on expansion of floor space by taking the sleeping areas on the third floor or attic out of service (total of about 620 square feet serviced by two narrow stairs built by George Brooks that were removed). At an estimated cost of \$125 per square foot for the new construction, \$345K was allocated to the historic rehab (about \$195 per square foot). This does not include my labor over eight months to strip the house and clean up the site during 2000 prior to bringing in a framing crew. And it does not include my labor to install all of the tile flooring and showers, interior and exterior painting, landscaping and HVAC control, cable TV and telephone wiring. We spent an additional \$60K on the swimming pool, hot tub and fencing; \$18K for the landscaping, \$9K for the driveway and \$20K for the septic system.

The cost to add the poolside buildings (labeled Workshop and Studio on the plat) was substantially lower than the main building and will improve our ability to service the debt and gain a reasonable rate of return on the investment when they are placed in service. Each of the poolside buildings have a footprint of 28' by 28' with interior partitioning for two guest bedrooms with private bathrooms.

### **Cost Structure for Maintenance of Historic Building**

The cost to maintain an old building like the George Brooks House is certainly higher than new construction that uses vinyl siding or vinyl-clad windows. By keeping the original wood siding and trim on the 1908 section built by George M.

Brooks, we will need to repaint the exterior about every 4 years based on current experience. The old wood siding tends to shed paint after a few years, and the trim around the original windows used on the gable ends certainly needs more attention than the newer sections built in 2001. The wood flooring may need refinishing more often than carpeted floors, and the gravel driveway has much higher maintenance than asphalt or concrete driveways.

At the suggestion of Charles Paul Goebel (Architect and member of the HPC from 2000 to early 2006), we brought in Stuart and Lenette Wells of RetroSpecs to assist in the preparation of this proposal and to meet the requirements for Historic Preservation Specialists to document the cost to rehab or maintain these historic buildings. Stuart and Lenette have worked on other projects in Talbot County and are known to the HPC members. They clearly meet the requirements established in Bill # 979 for Historic Preservation Specialists with over 20 years of combined experience in historic preservation, architecture and history.

The enclosed spreadsheets prepared by Stuart and Lenette Wells of RetroSpecs provides a detailed analysis of the projected cost structure to maintain the main George Brooks House, pool and gravel driveway. The cost to maintain this historic building, pool and driveway is projected to total \$184,538 over the next ten years including building reserves to replace the roof cedar shingles, HVAC fan-coil units and vinyl siding within 30 years. If this was allocated over just 6 guest bedrooms, the cost would exceed \$3,000 per year per room - making it even more difficult to service the debt.

The maintenance plan started with a careful survey of the property and equipment by Stuart and Lenette to determine the types of building materials used in the restoration of this historic building and HVAC equipment. They also checked the condition of the exterior siding, trim, doors, roof and windows. Each room was inspected to determine if there were any special maintenance issues. Following the inspection of the property and review of the construction drawings, spreadsheets were created to capture three types of maintenance projects. The first type of maintenance projects are planned annual preventive maintenance and include gutter cleaning, heat pump repairs, water heater maintenance and cleaning of smoke detectors. The second type are variable maintenance projects which are needed every few years such as exterior and interior painting, plumbing repairs, HVAC repairs and driveway repairs. For the first two types of maintenance, RS Means 2006 Facilities Construction Cost Data (21<sup>st</sup> Annual Edition) and Facilities Maintenance and Repair (13<sup>th</sup> Annual Edition) were used to determine the cost per unit or square foot as well as the frequency that the project should be undertaken. As per Means Cost Data, a regional location factor of 0.737 was used to adjust cost projections for Talbot County. Escalation factors for the out-years were created based on the historical escalation rates published in the Means Data books. Generally, an escalation rate between 3.5 to 5.0% per year was applied to the out-year maintenance projects. Square footage of various building materials were calculated from the floor plan and elevation

drawings prepared by Charles Paul Goebel, Architect, in 2000 for the restoration of the George Brooks House. Since the building and HVAC systems were new in 2001, the cyclical frequency of the maintenance projects start from that year.

The final type of maintenance is beyond ten years for major renewal projects like replacing the cedar roof shingles after 30 years, but which the owner must endeavor to build cash reserves to cover these major repairs in the future. For the George Brooks House, these projects include the replacement of the vinyl siding on the additions to the main house along with replacing the motors in the fan-coil units and the replacement of the cedar roof shingles. The Means cost data books referenced above were used to determine the frequency and cost factors by square foot or unit. The cost was adjusted for the regional factor of 0.737 and escalated in the out-years to cover the anticipated inflation. The yearly expense shown is calculated to reflect how much money should be set aside by the owner in a building repair reserve fund to cover these major repairs in the out-years. We need to start building this reserve fund as soon as the cash-flow improves and we can handle the debt-service plus this reserve fund.

The attached spreadsheets shows the Annual Preventative Maintenance projects which total \$55,488 over the ten year period. (2006 - 2015). The Variable Preventative Maintenance Projects which include painting, and repairs to the driveway, HVAC equipment and plumbing fixtures totals \$103,594 over the next ten years. The Renewal Projects which include replacing the cedar roof shingles and vinyl siding within 30 years will need about \$2,545 set aside per year (plus funds to cover years 2001 - 2005) so that there will be adequate reserves to cover the major repairs in the out-years. Please see the enclosed spreadsheets and Executive Summary prepared by Stuart and Lenette Wells.

### **Business Case for an Expanded Inn**

We have over 20 years of experience operating the Parsonage Inn in St. Michaels which has 8 guest bedrooms. When we decided to build the George Brooks House in 1999, our occupancy rate was 64.9% for the year with an average of 82% for May through September. Our revenue per room was \$31,488. Our revenue and occupancy would peak in 2000 at \$34,280 per room with an average occupancy for the year at 66.3%. According to industry surveys conducted by the Professional Association of Innkeepers (PAII), we were doing better than the nationwide averages or even Northeast Region averages. The national average for occupancy for inns in our category was about 40%.

We used these figures on occupancy and revenue yield per room from the Parsonage Inn to project the likely revenue to be generated by a more upscale George Brooks House B&B Inn. Even with factoring in the likelihood that it would take 5 years to approach the occupancy levels of an established inn, our actual revenue and occupancy would fall far short of our projections.

We have experienced a steady decline in revenue and occupancy for the Parsonage Inn over the past 5 years. For 2005, we only generated \$21,270 per room (a decrease of 38% from our high in 2000) with an average occupancy of 39.6%. In the prime season from May to September our occupancy fell from an average of 82% in 1999 to only 49.5% in 2005. To capture business in the last few years has required more aggressive discounting and "packages" that include two hour sails on the historic Skipjacks. All of this has driven our net revenue per room down while struggling to build occupancy. The answer as to why we have seen a steady decline is somewhat complex but a number of factors are in play. First of all, the number of rooms for overnight lodging in this area since 2000 has more than doubled - certainly if you add in the 400 rooms at the Hyatt Regency resort in Cambridge (heavily promoted as "the Chesapeake Bay experience"). The number of small B&B inns in Talbot County has grown and the Inn at Perry Cabin doubled the number of rooms at their facility in 2002.

In the "post 9/11" world, a number of inns closed and various segments of the travel industry experienced a significant decline in business. This was coupled with the "dot-com bust" in the stock market as we rolled into the 21<sup>st</sup> century with many middle and upper class travel customers suddenly feeling much poorer. Although the housing market has been a bright spot with historically low mortgage rates in the last few years, the average American in our primary mid-Atlantic market has likely experienced a decline in disposal income that would support a weekend in St. Michaels where the total cost could approach \$1,000 (or more). All of the expert analysis on the impact of the tax cuts in the last 5 years and shifting market forces (including the loss of higher paying manufacturing jobs) has shown a growing disparity between the rich Americans and those making less than \$100,000 a year. For most of the smaller B&B Inns that cater to the middle class (with room rates from \$100 to \$200+ per night), the market segment that we have served traditionally is not growing or likely to spend more on travel.

The other interesting factor is the emergence of the "baby boomers" and the younger "Generation X" customers seeking overnight lodging in Talbot County and St. Michaels. When we built the Parsonage Inn 20 years ago, it was to satisfy the interests of the couple seeking a "Bed and Breakfast" experience. Although we configured the inn with private bathrooms for all 8 guest bedrooms, we did not install a TV in all of the rooms and certainly not "Jacuzzi Tubs". In the 1990's, there was a "demand push" by younger clients to add things like two person Jacuzzi tubs in guest bedrooms. When we built the George Brooks House we decided to add more rooms with fireplaces and at least one or two larger rooms with two person Jacuzzi tubs. All rooms at our new inn were wired for telephone service and cable TV. We added DVD players to each room and have an extensive DVD movie library. But even with this expanded set of amenities in our guest rooms - we missed one emerging trend - SPA Facilities.

As a case study - consider the Five Gables Inn of St. Michaels. When this inn or its predecessor inn across the street (Brick Inn) first opened in the early 1990's, it was a traditional B&B Inn like the Parsonage Inn or Barrett's in the same block of North Talbot Street. Starting with just 2 rooms in the first building, the inn was expanded to 8 rooms using another building but still lagged most of the other inns in terms of revenue and occupancy (the Talbot County Finance Office would provide the room tax data on all of the inns during the 1990's). Later when the Five Gables Inn was being built, a consultant from California was brought in to advise on trends and other issues. The 8 rooms in the new building were configured to include a "Jacuzzi tub" in each room along with a gas fireplace. The inn added many amenities including indoor pool, steam room, sauna, whirlpool tubs for hydrotherapy and several treatment rooms (massage or facials). They have continued to advertise that Five Gables is an "Aveda Concept Spa" and provide services to the general public as well as overnight guests at the inn. They later reconfigured some of the rooms in the original buildings across the street to add "Jacuzzi tubs" and other amenities. Although the Talbot County Finance Office no longer publishes room tax figures by inn, other reliable information from the St. Michaels Business Association on lodging availability shows that the Five Gables Inn probably has the highest room occupancy or revenue per room of any of the traditional B&B Inns in the St. Michaels area. They purchased Barrett's B&B and are expanding Five Gables Inn and Spa to 22 guest bedrooms this summer.

The reports from PAll and other travel publications show that the inns leading the way are likely to have an extended list of amenities including SPA facilities. The traditional B&B Inns like the Parsonage Inn are servicing a shrinking market as the client base ages while the "Generation X" and "Baby Boomer" customers are seeking an amenity-rich travel experience. Five Gables Inn was the first to embrace this trend in the St. Michaels area, and subsequently other inns (like the St. Michaels Harbour Inn and Harbourtowne) have added Spa facilities.

The business case for adding Spa facilities has become clear in the past five years. The cost to add the Spa facilities can be quite high and may often require another building designed for the spa services to be offered. And to offset the cost of adding the spa facilities, the inn may want to offer Spa services to the general public. If these services are restricted to just guests at the inn, there must be a sufficient number of guest rooms to produce adequate demand for the Spa services. It is clearly a balancing act to match the number of guest rooms to the type of Spa services to be offered. With only six guest bedrooms in a traditional Talbot County B&B Inn, it would be very hard to justify the cost of adding Spa facilities. We built the two poolside buildings in 2003/2004 for adding four guest bedrooms, but the Spa facilities envisioned to create a distinctive set of Spa services will require at least 14 guest rooms. The rooms being added to expand from 6 guest bedrooms to 14 will compliment the type of high-end amenities being sought by the emerging "Generation X" clients and aging "Baby Boomers" who are seeking something more than a traditional "B&B Experience".

This proposal includes adding a new Spa building at the NW corner of the reconfigured Historic Overlay Zone (see revised plat dated 5-1-06 along with my drawings and artist sketches) which would provide 2 suites on the 2<sup>nd</sup> floor with 8 guest bedrooms in the main building and 4 in the poolside buildings. The Spa building is designed to offer a unique hydrotherapy environment for Talbot County inns along with treatment rooms for massage, facials and body wraps. The proposed hydrotherapy environment including a roman tub for relaxing in the Spa building will compliment our current facilities and dramatically improve our business in the "shoulder" seasons (spring and fall when it is too cold outside to use the pool). Our design with 14 guest bedrooms will allow us to restrict the use of the Spa facilities to our inn guests.

### **Historic Preservation Issues**

In evaluating other historic inns, it is interesting to note the number of guest bedrooms that is probably necessary to generate sufficient cash flows to pay for the rehab, operation or maintenance of these older inns. In Talbot County alone we have several interesting examples - the Robert Morris Inn with 14 rooms in the main building and 20 more in other buildings (Sandaway Lodge and additions) - the old Pasadena Inn (now "the Oaks") in Royal Oak with 15 guest bedrooms in the main building plus honeymoon cottage - and Wades Point Inn with 15 rooms in the main building and 12 in the newer riverfront annex. The cost to operate (heat and cool) and maintain these older buildings can be covered with a sufficient number of rooms. The cost for management and staffing can be amortized over a larger number of rooms - clearly an "economy of scale". Note that the Robert Morris Inn and Wades Point Inn were dramatically expanded in recent years while "the Oaks" was reconfigured and expanded with a large ballroom and supporting bar and kitchen facilities for hosting large weddings. All three of these historic inns in Talbot County have been changed dramatically from the configuration that existed 100 years ago.

As the County Council, Planning Office and HPC recognized when they drafted and passed Bill # 979 for Historic Rehab Overlay Zones, the county needs to provide economic incentives to encourage the rehab, maintenance and preservation of these important historic resources. This proposal seeks approval for an HRO Zone to expand the George Brooks House to 14 guest bedrooms with Spa facilities for its overnight guests.

### **Planning and Zoning Issues**

The proposed George Brooks Inn and Spa will provide 14 guest rooms from a modest Queen room in the section built by George in 1908 up to the poolside villas and the suites on the 2<sup>nd</sup> floor of the Spa building. A new parking area for



12 cars as suggested by the HPC this past winter will be West of the existing carriage house with a brick path leading to the West end of the main building. The poolside villas and the proposed Spa building will be serviced from the pool area and concrete deck with brick paths to the buildings. Please see the revised plat labeled Historic District Revision dated 5-01-06 for the placement of these buildings and parking areas. With 8.5 acres to work with, we easily meet the county limits on impervious surface, setbacks and lot coverage.

There are a number of specific zoning issues we are seeking approval under the HRO Zoning to complete the Adaptive Reuse and operation of the expanded George Brooks House Inn and Spa as permitted by Bill # 979.

1. Poolside Villas - approval to convert the existing Studio and Workshop buildings built under permits # 02-895 and # 02-896 in 2003/2004 to 4 guest bedrooms. We will file for new building permits as agreed with the Planning and Zoning Office to get these buildings approved for 4 guest bedrooms and to have the Health Officer approve the septic system to be completed before occupancy permits will be issued for these two buildings. Our architect, Charles Goebel of Easton, will submit his certification that the buildings meet all building and fire codes when we file for new building permits.
2. Reconfiguration of Historic Overlay Zone - the original 1.99 acre Historic Overlay Zone approved by the HPC in 2000 was reduced to 1.54 acres upon the recommendation of the Planning Commission to eliminate the section within 100 feet of Rt. 33 to permit widening of Rt. 33 at some future date. This past winter, the HPC recommended that the Historic Overlay Zone be reconfigured and expanded to the NW to allow placement of the proposed Spa Building with sufficient separation from existing structures.
3. Spa Building - approval to build the new Spa Building (two story frame building with a footprint of 45' by 32' as shown on the revised plat) to provide Spa facilities on the first floor and two guest bedroom suites on the second floor. The HPC gave tentative approval for this building in March at their monthly meeting. We hereby submit revised architectural drawings and sketches of the proposed Spa building meeting the footprint and general configuration agreed with the HPC this past March. The building has been moved further to the NW on the enclosed plat to satisfy the request from the HPC members.
4. Main Building - approval to convert the owner's bedroom and living room on the second floor to two guest bedrooms. This would provide 8 guest bedrooms in the main building with 6 guest bedrooms in the poolside villa and spa buildings.
5. Spa Facilities - approval to provide spa services including hydrotherapy, massage, body wraps and facials for inn guests. We are not seeking approval for a "Day Spa" to provide spa services to the general public.

6. Parking area - approval to add the parking area for 11 cars West of the carriage house to support the 14 room inn and to limit the visual impact of cars parked in the driveway or in front of the carriage house. This parking area will have sufficient landscaping to screen the parked cars visually from people driving or walking down Rolles Range Road. The carriage house will screen the cars from someone looking at the property from Rt. 33.

7. Signs - approval to add a 2<sup>nd</sup> sign out near the intersection with Rt. 33 so guests can find the inn. Our current sign is in front of the inn along Rolles Range Road over 240 feet from Rt. 33 and less than 6 square feet as required by the B&B zoning regulations. The 2<sup>nd</sup> sign would be limited to 6 square feet and set back from Rt. 33 by over 30 feet

8. Food Service - permission to occasionally serve lunch and dinner for business meetings, family reunions or small weddings. Our kitchen has been converted to meet the commercial food service requirements and inspected by the Health Department. This is especially important to attract group functions that would use the entire inn. No liquor license is being considered as guests normally provide their own beverages and the demand is not sufficient for us to carry significant inventory or to cover the cost of the liquor license.

9. Historic Rehabilitation Overlay Zone (HRO) - by action of the County Council, grant an HRO Zone that overlaps the Historic Overlay Zone of 1.99 acres and permit us to operate a 14 room Historic inn with Spa services as defined above.

10. Growth Allocation - on July 12, 2006, Mike Pullen (County Attorney) advised us and the Planning Officer that he felt that we would need to seek "Growth Allocation" as we are in the Critical Area (within 1,000 feet of Long Haul Creek) and zoned RC on the section of the property that includes the historic overlay zone. We need Talbot County to approve the Growth Allocation and upgrade the 1.99 acre section of the property comprising the Historic Overlay Zone and Rehab Overlay Zone to the "LDA" designation for limited development to support the expanded use as a 14 room inn. Note the inn's buildings are about 900 feet from the water and just barely within the 1,000 foot restriction for the Critical Area.

#### Tax Credits and Funding for Rehab or Maintenance of GBH

When the George Brooks House project was started in 1999, we contacted the Maryland Historic Trust for advice on the rehab of the building and any requirements for obtaining either State or Federal tax credits. We did not seek any State funds for the rehab as those funds are very limited (generally for private owned residences and not income producing properties). We also contacted Paul Toart, Historic Preservationist, to inspect the building and advise us on the potential tax credits. Paul had prepared the proposal in the 1980's to establish the Historic District of St. Michaels which was subsequently approved in 1985 by

*Dicks into  
a hotel class.  
✓  
whole parcel  
or acreage  
of CA*

*4.251 acres*

the Maryland Historic Trust and the Federal Government. We learned from Paul that the George Brooks House was quite removed from the historic district of St. Michaels and would probably have to qualify on its own merits. We talked to Peter Kurtz at MHT, but he advised that they were too busy to inspect the building or advise on the rehab. Peter told us to document the restoration carefully (take lots of photos) and to follow the Department of Interior Guidelines and file the Part 1 and 2 of the Heritage Preservation Certification at a later date.

Last September, I contacted Paul Toart to assist in preparing Part 1 and 2 of the Rehab Tax Credit forms and he advised that the State of Maryland had changed the rules and that we had missed the deadline of July 1, 2005. This was the result of action by the State Legislature to limit the number and amount of tax credits for historic rehab in the State, especially for "commercial projects". It appears that we have lost the opportunity to gain the 20% State tax credit for the \$345K spent to rehab the George Brooks House.

We will file with the Department of Interior to try to qualify for the Federal Tax credit of 20%. This will require the George Brooks House to qualify for individual listing on the National Register of Historic Buildings. They normally require the Part 1 submitted for Historic Significance before the work is finished, so this is considered unlikely by the Historic Preservation Specialists we have consulted.

No public funds are being sought to maintain this historic building, so we are quite dependent on the County Council granting the HRO Zoning to support the expanded 14 room inn with Spa facilities.

### **Impact Statement**

The proposed 14 room George Brooks House Historic Inn and Spa is designed to meet the demands of the marketplace for enhanced amenities including spa services. This inn would approach the size of the current Five Gables Inn and Spa in St. Michaels and would be smaller than other Historic Inns in this area including "the Oaks", Wades Point Inn and the Robert Morris Inn. There are a number of planning and zoning issues that we have identified as follows:

1. Traffic - egress to and from GBH is via Rolles Range Road, a county maintained two-lane tar/gravel road that ends at the old plantation fronting Broad Creek. There are only 4 private residences (in use) along Rolles Range Road plus the large property at the end. The guests at GBH will not be driving past the other private residences and will generally be making a right-hand turn onto Rt. 33 to head back into St. Michaels, Easton, Oxford or to return home. We provide 7 speed bikes for our guests and we are only ½ mile North of the Chesapeake Bay Maritime Museum entrance. Many of our guests elect to take the bikes or walk back into town rather than getting into their cars and worrying about where to park their car in town (especially on busy summer weekends).

2. Noise - we have created an environment for mature adults and where noise is not a welcome guest. Even though we sit on 8.5 acres of land, we have additional "buffers" on all four sides to further isolate us from private residences within a thousand feet of the inn. To the East, Rt. 33 and farmed land on the other side of the road provides a significant buffer for private residences to the East that are set well back from the road. To the North, there are mature woods that provide a major buffer for homes along Rt. 33 to the North. To the West, we have a vacant lot that is heavily wooded before you get to parcel 38 owned by Robert Deppe. And to the South, there are woods directly across Rolles Range Road with no residential development possible (set aside for right-of-way of proposed St. Michaels by-pass road). To the Southwest, the closest residence is that of parcel 78 owned by Donna Cole whose husband was the son of one of the little girls that were raised at this property by George and Mamie Brooks.

3. Visual Separation from adjoining Properties - the only private residence within 500 feet not separated by woods or farmland is to the SW on plat 78 owned by Donna Cole. Both our carriage house and the trees on the front of her property block any direct line of sight to the George Brooks House. None of the homes along the St. Michaels Road can be seen from this inn.

4. Septic Systems - we have an approved SDA and septic system installed for the main house and carriage house as shown on the plat. The second SDA labeled "B" to the North is 150' by 120' and more than adequate to support the six additional bedrooms in the poolside buildings and the proposed Spa building.

5. Water System - we have a high capacity (30 GPM) deep-well (540 feet) water system installed by Shannahan's in 2000 to service the inn and the out-buildings. This water supply has been tested several times by the County Health Department and meets all water quality requirements.

6. Parking - we have some parking in front of the carriage house and at the recommendation of the HPC have shown a new parking area to the West of the carriage house that will be screened with landscaping/bushes from Rolles Range Road to limit the visual impact of this parking area and the cars.

7. Signs - we need a second sign visible from Rt. 33 as the one six foot square sign we installed closer to the house is about 240 feet from the main road and only visible when you drive down Rolles Range Road. The new sign would be set back over 30 feet from Rt. 33.

8. Set-backs - all of the buildings on the site met county set-back requirements without a variance when they were built. The proposed Spa building will be in the NW corner of the expanded Historic Overlay Zone and easily meet the set-back requirements.

9. Impervious surface and lot coverage - we meet the 15% limit on impervious surface or lot coverage limitations

10. Building Codes for the Spa Building - the State Fire Marshall has reviewed the preliminary plans for compliance with fire codes. The drawings submitted for the two story frame building with a footprint of 45' by 32' and a height of about 26' will meet county building codes and were prepared to gain approval from the HPC on the architectural elements and placement of the building. We chose not to incur the high cost of complete architectural drawings required for the building permit and construction until we can gain approval from the HPC for the design and placement of this building as well as the HRO Zoning from the Planning Commission and County Council as defined by Bill # 979.

It is worthwhile to consider the condition of this property in 1999 before we acquired it. There were two billboards close to Rt. 33 that advertised "Tilghman Island Realty" and another business. We advised the advertising company in 2000 that we would not renew the contract and gave up \$3,600 per year (and probably more in future years) and had the signs and poles removed in the summer of 2001. The old house was an eye-sore and neighbors had pushed to have the house demolished (a demolition permit had been granted). Several builders we interviewed thought we were foolish to try and save this house as the structural elements were severely damaged by water and termites. Our work on this property over the past six years has dramatically improved the view from Rt. 33 as you approach St. Michaels from the West and along Rolles Range Road.

## **Summary**

This proposal is to gain HRO Zoning for a 14 room Historic Inn and Spa as permitted by Bill # 979. The size and scale of this historic inn is generally smaller than other historic inns in Talbot County. The photographs taken of the property show the main house along with the out-buildings within the 1.99 acre Historic Overlay Zone - the carriage house was built in 2000/2001 and the two poolside buildings built in 2003/2004. The proposed two story Spa building will be in the NW corner of the Historic Overlay Zone. This historic site is on an 8.5 acre parcel with additional buffers on all four sides to provide substantial isolation from neighboring private residences. Growth Allocation will be needed on the 1.99 acre Historic Overlay Zone to change from RC to an LDA designation. The George Brooks House is clearly one of the most important historic buildings in this area - especially for the African-American community. To offset the higher cost to restore and maintain the main house, we need several out-buildings to provide additional guest bedrooms and Spa services for our overnight guests. The supporting documents and photographs including the revised plat labeled Historic District Revision (5/1/06) are part of this proposal and included for review by the HPC, Planning Commission and County Council.

## LENETTE CURTIS WELLS, PRINCIPAL

Lenette Curtis Wells has broad experience in the historical and physical assessment, as well as the treatment of historic structures. Her seven years of work in small architecture firms that specialize in historic preservation has resulted in a strong, well-versed architectural background. During her graduate studies at the University of Pennsylvania, Ms. Wells was employed as a preservation consultant to John Milner Architects, Inc., Chadds Ford, PA, Independence National Historical Park, Philadelphia, PA, the Fairmount Rowing Association, Philadelphia, PA and the City of Canandaigua, New York. Prior to her graduate studies, Ms. Wells was employed as a curatorial assistant at the Woodrow Wilson House, Washington, D.C. Ms. Wells is NCARB certified and qualified to sit for the professional architectural licensing exam.

### Professional Experience

RetroSpecs, Birdsboro, PA; Architectural Historian, 6/00-Present

DESIGNWORKS Architects, Reading, PA; Intern Architect, 2/00-9/05

Frens & Frens LLC, Restoration Architects, West Chester, PA; Intern Architect, 9/97-2/00

John Milner Architects, Inc., Chadds Ford, PA; Historic Preservation Consultant, 6/97-12/97

Independence National Historical Park, Philadelphia, PA; Intern, Historic Structures, 1/97-9/97

Fairmount Rowing Association, Philadelphia, PA; Historic Preservation Consultant, 1/97-7/97

Independence National Historical Park, Philadelphia, PA; Intern, Architectural Study Collection, 9/95-6/97

City of Canandaigua, NY; Consultant, Dept. of Development and Planning, 6/96-8/96

National Trust for Historic Preservation, Washington D.C.; Curatorial Assistant,

The Woodrow Wilson House, 3/95-8/95

Douglas County Public Works, Lawrence, KS; Engineering Technician, 6/94-3/95

### Education

M.S. in Historic Preservation, May 1997

University of Pennsylvania, Philadelphia, Pennsylvania

Bachelor of Architecture, May 1993

University of Kansas, Lawrence, Kansas

#### Additional coursework:

George Washington University, Washington, D.C., Fall 1993

### Representative Projects

#### Preservation Planning and Documentation

- Facility Audits for 21 Buildings at the University of Pennsylvania, Philadelphia, PA.
- Project manager and contributing author for the Music Hall Historic Structure Report, Talbot County Courthouse, Easton, MD.
- Maryland Historic Preservation Rehabilitation Tax Credit Application, Goebel Residence, Easton, MD.
- Feasibility Study for 129 N. Mill Street, Birdsboro, PA for the Birdsboro Community Library.
- Architectural Conservator, Feasibility Study for Historic Franklin Street Station, Reading, PA for BARTA.
- Architectural Conservator, Feasibility Study for the Adaptive Reuse of the Historic Waterworks Building, Reading, PA for the Berks County Conservancy.
- Principal Author, Historic District Design Guidelines for the town of New Market, Maryland.
- Contributing author, National Historic Landmark Nomination for the Mill at Anselma, Chester County, Pennsylvania for the Mill at Anselma Preservation and Educational Trust, Inc.

- Feasibility Study for 129 N. Mill Street, Birdsboro, PA for the Birdsboro Community Library.
- Feasibility Study for the Adaptive Reuse of the Old Evan's Mill, Wyomissing, PA for the Wyomissing Foundation.
- Architectural Conservator, Condition Assessment for historic Willow Mill, Mechanicsburg, PA for the Master Plan of Willow Mill Park, Cumberland County Parks.
- Architectural Conservator, Wall Moisture Monitoring Program at the Gideon Gilpin House, Brandywine Battlefield, Chadds Ford, PA for the Pennsylvania Historical and Museum Commission.
- Architectural Conservator, Preservation Plan for the Beechwood Estate, Bryn Mawr, PA, for the Friends to Save Beechwood.
- Architectural Conservator, ICAP Condition Assessment of the Arsenal, New Castle, DE for the Delaware State Museums.
- Architectural Conservator, Facade Assessment of William Penn Memorial State Museum, Harrisburg, PA for the Pennsylvania Historical and Museum Commission.
- Architectural Conservator, Comprehensive Conservation Study of the John Bartram House, Philadelphia, PA, for Historic Bartram's Garden.
- Principal Investigator, Historic Structure Report for the Swetland Homestead, Wyoming, PA, for the Wyoming Historical Society, Wilkes-Barre, PA.
- Principal Investigator, Historic Structures Report for the King of Prussia Inn, King of Prussia, PA.
- Principal Investigator, Historic Structures Report for Fairmount Rowing Association Boathouse, Historic Boathouse Row, Philadelphia, PA.
- Processed documentation and condition data into the Inventory and Condition Assessment Program (ICAP) for three historic National Park Service buildings, Independence National Park, Philadelphia, PA.
- Architectural Conservator, annual condition assessment of park inventory structures, Independence National Historical Park, Philadelphia, PA.
- Author, Design Guidelines for the Historic Central Business District of Canandaigua, New York..
- Cataloging of 300 historic architectural fragments in the Architectural Study Collection, Independence National Historical Park, Philadelphia, PA

#### **Design and Construction**

- Designer, Restoration of Nemours Mansion, Wilmington, DE (in progress).
- Designer, Ullman Residence, Wyomissing, PA (in progress).
- Architectural Consultant, Specifications for the renovations to the Minersville Public Pool bathhouse.
- Designer, Janssen Barn Conference Center feasibility study, Penn State Berks, Pennsylvania.
- Designer, new wine making facility, Blue Mountain Vineyard, New Tripoli, PA.
- Architectural Conservator and Designer, renovations to the log cabin at the historic Leaser Homestead for Blue Mountain Vineyard, New Tripoli, PA (in progress).
- Designer, renovations to 619 Penn Avenue, West Reading, for The Compleat Baldwin Brass Centre, West Reading, PA.
- Designer and project manager, renovations to the Reese residence, Wyomissing, PA
- Designer, addition and renovations to the Shuttlesworth residence, Wyomissing, PA.
- Designer, renovations to the Lutz residence (kitchen) Mount Penn, PA.
- Project Manager, renovations to the Devos residence, Wyomissing, PA
- Architectural Conservator, historic Waterworks Building, Reading, PA for the Berks County Conservancy.
- Designer, addition and renovations to the Reading Berks Emergency Shelter, Reading PA for the Reading Berks Emergency Shelter.
- Architectural Conservator, adaptive reuse of Shelley School, York, PA for PFG Capital, York, PA (Federal Tax Credit Project).
- Project Manager, Perkiomen Apartments, Reading, PA for the Berks Counseling Center.
- Project Manager, porch enclosure at the Moll residence, Wyomissing, PA.
- Designer, addition to the Wells residence, South Andover, New Hampshire.
- Architectural Conservator, restoration of the roof of the Zwaanendael Museum, Lewes, DE, for the Delaware State Museums.
- Project Coordinator, facade design for the High Street Parking Garage, West Chester, PA, for the Borough of West Chester, PA.
- Consulting Masonry Conservator, restoration of the Capitol Annex Building, Harrisburg, PA.

- Architectural Conservator, restoration of the Indian River Lifesaving Station, Dewey Beach, DE for the Delaware Seashore Preservation Foundation.

## **Publications**

"At the Top of the World: The Blue Ridge Parkway," 38:2 *Automobile Quarterly*, October 1998.

*Understanding the Big Box: Negotiating with a Large-Scale National Retailer to Protect Main Street*, University of Pennsylvania, Masters Thesis, 1997.

*Design Guidelines: Downtown Canandaigua*, Canandaigua, New York: Department of Development and Planning, 1996.

## **Activities**

Birdsboro Community Library, Board of Trustees, 12/2000-1/2003 (President 1/01-1/2003)

Task Force Member, The National Park Service HSR Technical Manual Project Workshop, June 1999

Boyertown Museum of Historic Vehicles, Boyertown, PA, Volunteer, 1998-present

Sully Historic Site, Chantilly, VA, Volunteer, 1993-1994

## **Memberships**

Society for Industrial Archeology, 2002-present

National Council of Architectural Registration Boards, Intern Development Program, 1998-present

(Qualified to take architectural licensing exam 11/02)

Friends of the Woodrow Wilson House, 1995-present.

National Trust for Historic Preservation, 1993-present.



### Methodology

To create the ten year maintenance plan (2006-2015) for the main house and pool area of the George Brooks House, an initial site survey was conducted to determine the types of building material and systems, the extent of the materials, and the condition of the materials. A subsequent spreadsheet was created to estimate the expenses for three types of maintenance projects. The first type of maintenance projects are planned annual preventative maintenance projects. These projects include items that are anticipated for renewal or regular maintenance on a yearly basis and include items such as gutter cleaning, heat pump maintenance, water heater maintenance and smoke detector maintenance. The maintenance of the outdoor swimming pool is also included. The second type of maintenance project for which expenses were estimated are variable planned maintenance projects such as exterior and interior painting, plumbing repairs, HVAC repairs and driveway repairs. For the first two types of projects, RS Means 2006 cost data books, *Facilities Construction Cost Data (21<sup>st</sup> Annual Edition)* and *Facilities Maintenance and Repair (13<sup>th</sup> Annual Edition)* were used to determine the cost per unit or square foot as well as the frequency that a project should be undertaken. As per Means Cost Data, a regional location factor of .737 was applied to adjust prices for the St. Michaels area. Escalation factors were created based on the historical escalation rates published in the Means Data books. Generally, an escalation rate between 3.5% and 5% was applied per year. Square footage areas of building materials were calculated from floor plan and elevation drawings prepared by Charles Paul Goebel for the 2001 rehabilitation of the building and provided by the owner. Since all systems were new in 2001, the cyclical frequency of the maintenance projects were started from 2001.

The final types of project included in the maintenance plan are large renewal projects (post 2015) that are beyond the 10 year scope but which the owner must endeavor to build a reserve of money for in order to pay the anticipated expenses. For the George Brooks House, these projects are the wood shingle roofing replacement, vinyl siding replacement and fan coil unit replacement. Again, RS Means 2006 cost data books, *Facilities Construction Cost Data (21<sup>st</sup> Annual Edition)* and *Facilities Maintenance and Repair (13<sup>th</sup> Annual Edition)* were referenced for the unit or square footage expenses and the frequency of the project. The same regional location factor was applied. The escalation rates were calculated based on the decade escalation rate multiplied by the appropriate frequency of the project. The square footage and units were based on the owner provided drawings and owner provided information. The yearly expense is the total estimated amount of the project, divided by the frequency. It was assumed that the owner has already started the reserve fund in 2001.

Attachment #8

Prepared by:  
RetroSpecs  
Birdsboro, PA

**Summary Sheet**

**Annual Preventive Maintenance**

See attached sheet for base cost calculation

Item-Building	Escalation	Base price	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	TOTAL
			1	1.05	1.08675	1.124786	1.164154	1.195586	1.243469	1.286929	1.33197	1.37859	
Gutter Cleaning		\$75.62	\$79.40	\$82.18	\$85.06	\$88.03	\$90.41	\$94.03	\$97.32	\$100.72	\$104.25	\$107.89	\$897.02
HVAC-heat pumps		\$412.72	\$433.36	\$448.52	\$464.22	\$480.47	\$493.44	\$513.20	\$531.14	\$549.73	\$568.97	\$588.80	\$4,395.78
Water Heater Main.	260.9	\$260.90	\$273.95	\$283.53	\$293.46	\$303.73	\$311.93	\$324.42	\$335.76	\$347.51	\$359.67	\$372.83	\$3,094.86
Smoke Detectors	114.53	\$114.53	\$120.26	\$124.47	\$128.82	\$133.33	\$136.93	\$142.41	\$147.39	\$152.55	\$157.89	\$163.37	\$1,358.58

**Item-Site**

Swimming pool	\$3,813.98	\$4,004.68	\$4,144.84	\$4,289.91	\$4,440.06	\$4,559.94	\$4,742.57	\$4,908.32	\$5,080.11	\$5,257.91	\$5,448.70	\$5,648.57
<b>Total</b>	<b>\$4,677.75</b>	<b>\$4,911.64</b>	<b>\$5,083.54</b>	<b>\$5,261.47</b>	<b>\$5,445.62</b>	<b>\$5,592.65</b>	<b>\$5,816.64</b>	<b>\$6,019.93</b>	<b>\$6,230.62</b>	<b>\$6,448.70</b>	<b>\$6,672.40</b>	<b>\$6,901.27</b>

**Annual Preventive Maintenance for post 2015 projects**

See attached sheet for base cost calculations

Escalated and divided by lifespan of item

Items-Building Only	Base price	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	TOTAL
Roof Replacement	35,086	\$1,169.52	\$1,169.52	\$1,169.52	\$1,169.52	\$1,169.52	\$1,169.52	\$1,169.52	\$1,169.52	\$1,169.52	\$1,169.52	\$11,695.20
Vinyl Siding Replace	11,090.05	\$443.60	\$443.60	\$443.60	\$443.60	\$443.60	\$443.60	\$443.60	\$443.60	\$443.60	\$443.60	\$4,436.00
Fan Coil Replace	13,985.64	\$932.38	\$932.38	\$932.38	\$932.38	\$932.38	\$932.38	\$932.38	\$932.38	\$932.38	\$932.38	\$9,323.80
<b>Total Post 2015</b>		<b>\$2,545.50</b>	<b>\$2,545.50</b>	<b>\$2,545.50</b>	<b>\$2,545.50</b>	<b>\$2,545.50</b>	<b>\$2,545.50</b>	<b>\$2,545.50</b>	<b>\$2,545.50</b>	<b>\$2,545.50</b>	<b>\$2,545.50</b>	<b>\$25,455.00</b>

**Planned (Variable) Preventive Maintenance**

See Attached sheets for base cost calculations and breakdown

Base price	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	TOTAL
<b>Total Variable</b>	<b>\$13,925.50</b>	<b>\$4,759.24</b>	<b>\$362.81</b>	<b>\$15,584.93</b>	<b>\$4,039.27</b>	<b>\$40,645.74</b>	<b>\$239.98</b>	<b>\$22,048.45</b>	<b>\$257.07</b>	<b>\$1,731.38</b>	<b>\$103,594.37</b>
<b>Total Annual Maint.</b>	<b>\$21,148.75</b>	<b>\$12,216.38</b>	<b>\$7,991.85</b>	<b>\$23,391.90</b>	<b>\$12,030.39</b>	<b>\$48,783.89</b>	<b>\$8,602.12</b>	<b>\$30,613.88</b>	<b>\$9,033.19</b>	<b>\$10,725.58</b>	<b>\$184,537.94</b>

Variable and Post 2015 Preventive Maintenance										
PROJECTS COSTS										
Complete Rehab 2001										
NUMBER	DESCRIPTION	CYCLE	YEARS ASSIGNED	Q. TYPE	QUANTITY	COST/QUANTITY	SUBTOTAL	R.A.	TOTAL	
1A	Exterior Painting-wood siding	4	2009, 20013	Sq. ft.	1065	\$3.54	\$3,770.10	0.737	\$2,778.56	
1B	Exterior Painting-wood windows	4	2009, 20013	each	52	\$156.80	\$8,153.60	0.737	\$6,009.20	
1C	Exterior Painting-wood soffit& fascia	4	2009, 20013	Sq. ft.	860	\$2.76	\$2,373.60	0.737	\$1,749.34	
1D	Exterior Painting- doors	4	2009, 20013	each	10	\$106.00	\$1,060.00	0.737	\$781.22	
1F	Exterior Painting-Porches	4	2009, 20013	allowance			\$1,750.00	0.737	\$1,289.75	
1	Total						\$17,107.30		\$12,608.08	
2A	Interior Painting-walls	5	2006, 2011	sq. ft.	8300	\$0.80	\$6,640.00	0.737	\$4,893.68	
2B	Interior Painting-doors	5	2006, 2011	each	24	\$53.50	\$1,284.00	0.737	\$946.31	
2C	Interior Painting-windows	5	2006, 2011	each	52	\$156.60	\$8,143.20	0.737	\$6,001.54	
	Total Painting								\$11,841.53	
3	Interior Painting-Stair Risers	2	2007, 2009, 2011, 2013	sq. ft.	96	\$2.73	\$262.08	0.737	\$193.15	
4	Interior wood floor refinishing	10	2011	sq.ft	2765	\$5.00	\$13,825.00	0.737	\$10,189.03	
5	Roof replacement or maintenance?									
5	Plumbing-toilet repairs (unclog line and replace washer/diaphragm in ball cock)	5	2006, 2011	each	8	\$215.50	\$1,724.00	0.737	\$1,270.59	
6	Plumbing-lavatories (bathroom only), replace washer in faucet, clean out strainer and p trap	2	2007, 2009, 2011, 2013	each	8	\$43.39	\$347.12	0.737	\$255.83	

7	Plumbing-lavatories, replace washer in spud connection	7	2008	each	8	\$24.91	\$199.28	0.737	\$146.87
8	Plumbing-showers, inspect/clean shower head	2	2007, 2009, 2011, 2013	each	7	\$44.69	\$312.83	0.737	\$230.56
9	Plumbing-showers, replace mixing valve barrel	2	2007, 2009	each	7	\$149.16	\$1,044.12	0.737	\$769.52
10	Plumbing-showers, replace mixing valve	10	2011	each	7	\$307.66	\$2,153.62	0.737	\$1,587.22
11	Rainwater-gutters, general cleaning, maintenance and repair	1	2006, 2007, 2008, 2009, 2010, 2011, 2012, 2013, 2014, 2015	L.F.	380	\$0.27	\$102.60	0.737	\$75.62
12	HVAC-Repair fan-coil unit. Remove fan motor, replace fan motor	10	2011	each	14	\$300.00	\$4,200.00	0.737	\$3,095.40
13	HVAC-Repair damaged/replace foam rubber pipe insulation	5	2011	L.F.	50	\$25.00	\$1,250.00	0.737	\$921.25
14	HVAC-repair 5 ton heat pump	10	2011	each	2	\$2,585.00	\$5,170.00	0.737	\$3,810.29
15	Driveway-add gravel	3	2007, 2010, 2013	tons	38	\$117.00	\$4,446.00	0.737	\$3,276.70
16	Repair rutted areas of driveway by adding 8" compacted aggregate base course at entrances to driveway. Approx. 10x18x 2 entrances	5	2006, 2011	sqft	360	\$1.75	\$630.00	0.737	\$464.31

17	Clean and Service Water Heaters	1		2006, 2007, 2008, 2009, 2010, 2011, 2012, 2013, 2014, 2015	each	2	\$177.00	\$354.00	0.737	\$260.90
18	Overhaul water heater	5		2006, 2011	each	2	\$105.88	\$211.76	0.737	\$156.07
19	Repair fan-coil units	10		2011	each	14	\$250.00	\$3,500.00	0.737	\$2,579.50
20	Smoke detectors-annual	1		2006, 2007, 2008, 2009, 2010, 2011, 2012, 2013, 2014, 2015	each	12	\$12.95	\$155.40	0.737	\$114.53
21	Pull Station Maint.	10		2011	each	3	\$78.45	\$235.35	0.737	\$173.45
<b>Post 10 year projects</b>										
1	Vinyl siding replacement	25		2026	sq ft	1540	\$3.80	\$5,852.00	0.737	\$4,312.92
								escalation	2.5714	\$11,090.05
									per yr	\$443.60
2	Wood shingle replacement	30		2031	sq ft	4535	\$4.70	\$21,314.50	0.737	\$15,708.79
								escalation	2.2335	\$35,085.75
									per yr	\$1,169.52
3	Replace fan coil units	15		2016	each	14	\$950.00	\$13,300.00	0.737	\$9,802.10
								escalation	1.4268	\$13,985.64
									per yr	\$932.38



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4/197H

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(USE TOWN CODE)

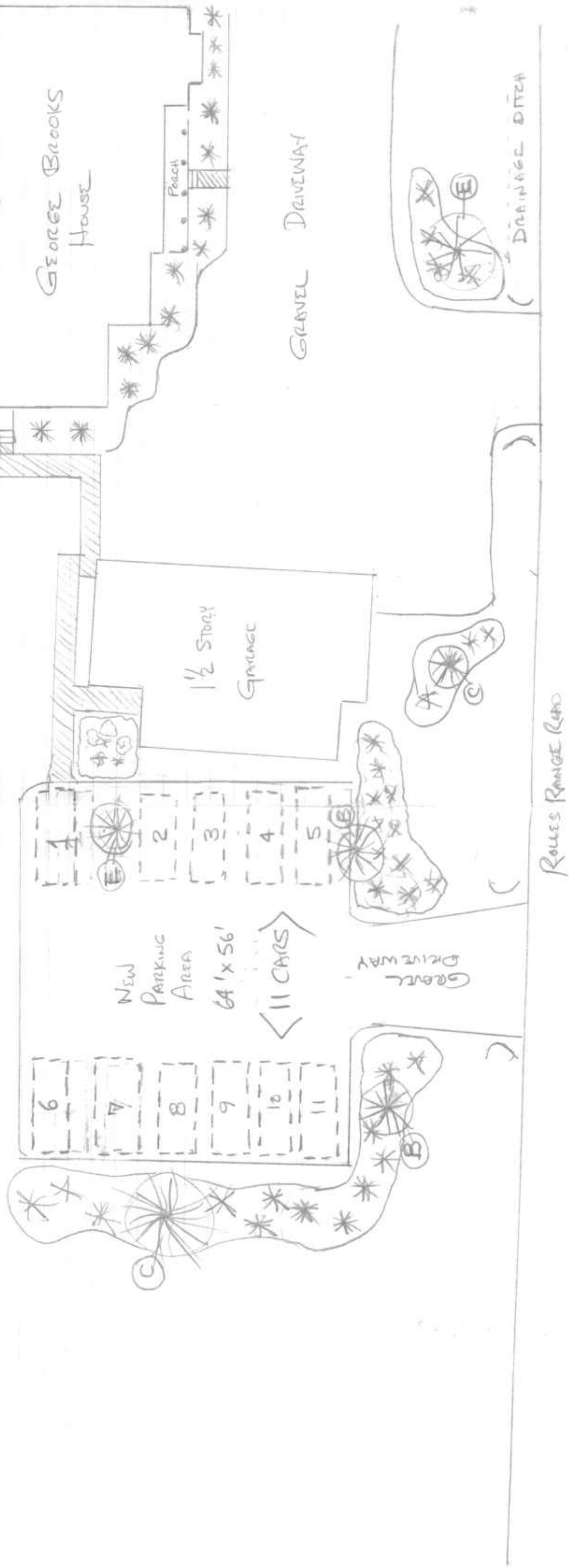
PROPOSED PARKING AREA  
w/ LANDSCAPING

George Brooks House Inn

Scale 1" = 16'

7/2/06  
WW

- A - RIVER BIRCH TREE
- B - RED SUNSET MAPLE
- C - KWANZAN CHERRY
- D - DOUGLAS FIR
- E - OCTOBER GLORY MAPLE







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Project Title  
**The Brooks  
House Inn**  
Rolles Range Road at Route 33  
Talbot County, Maryland



Professional Certification: I certify that these documents were prepared or approved by me, and that I am a duly registered architect under the laws of the State of Maryland, license number 5707, expiration date 10-15-2001.

Sheet Title  
**Elevations**

General Notes  
**Issued for Permit  
Not for Construction**

Issues and Revisions

No.	Mark	Date
1		06 NOV 2000

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Project No.  
**00-04**

Scale  
**1/4"=1'-0"**

Sheet **7** of **8**

Sheet No.

**A7**



North Elevation  
Scale: 1/4"=1'-0"



South Elevation  
Scale: 1/4"=1'-0"

