

**The Galena Territory**

**Long-Range Plan**

February 24, 2007

## **ACKNOWLEDGEMENTS**

Development of the Long-Range Plan for The Galena Territory has involved the cooperative effort of many people, including: the Board of Directors with their approval in January, 2006 of the Mission Statement and Goals contained in Chapter 4, their individual involvement along the way, and their final approval in January, 2007; the Long-Range Planning Committee and its collective and individual commitment to the effort and many hours of hands on work; many other GTA committees, especially with their involvement in the development and presentation of projects and programs; and the staff with its with its support and assistance in providing information and pulling the document together. Although only the official GTA “family” is recognized below, the involvement and support of many others was required to complete the Plan and make it the living document that we all hope that it will be.

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# **Chapter 1**

## **Introduction**

### **The Scope, Purpose and Organization of the Plan**

A typical long-range plan for a community focuses primarily on the physical development and redevelopment and expansion of a community and usually creates a land use plan providing the basis for zoning, subdivision, and other development decisions and the expansion of infrastructure. The scope of the Long-Range Plan (the Plan) for The Galena Territory will differ from that of a typical community long-range plan in that its focus will be on the development, maintenance, and operation of community facilities, services, and programs enhancing the quality of life for both a permanent and part-time resident population and for maintaining and enhancing the value of developed and undeveloped property within the Territory. The Plan will not only identify the facility, service, and program needs of residents and other property owners, but will set forth a multi-year operational and capital plan for meeting such needs within the financial capabilities of the Territory. It is anticipated that this multi-year development plan will form the basis of annual financial and operational planning and budgeting decisions of The Galena Territory Association (GTA) Board of Directors (Board).

The GTA first developed a long-range plan in the early 1990's with an update in 1994 and again in 1996. More recently, in 2000 a redraft of the long-range plan was prepared. This Long-Range Plan, developed in 2006, is intended to bring the Plan up to date and create a framework for the development of the Territory over the next 10 years. To ensure that it is kept up-to-date, the Plan should be reviewed annually and comprehensively updated at least every five (5) years.

Following the presentation of historical and current background information about the Territory in Chapter 2, Chapter 3 identifies and describes a number of areas that represent opportunities of The Territory, presents challenges that need to be addressed, and concerns that should be considered. Chapter 4 sets forth a Mission Statement and a Statement of Goals that form the policy framework for evaluating specific projects and programs by the Board. By providing this policy framework for decision making the greatest benefits can be attained for residents and owners within the limits of available resources and incremental decisions will be made consistent with the Mission and Goals of the Plan. Chapter 4 also identifies prioritized capital project and program objectives organized around the Statement of Goals.

Chapter 5 sets forth a recommended implementation plan. The implementation plan is multi-year and includes both capital and non-capital projects and programs. Estimated costs associated with each project or program are identified to the extent possible at the long-range planning level with the understanding that each capital project or program will require further detailed evaluation as to cost and financial feasibility as they are considered for implementation action, including architectural and engineering studies as appropriate. In the case of non-capital projects and programs, recommendations will be made relative to their implementation.

Finally, at the end of the Plan there is an Appendices containing supplemental information including references, detailed project and program data sheets, and other materials relevant to the Plan.

## **Chapter 2**

### **Development History, Governance,** **Demographics, Services, etc.**

#### **Historic Context**

The area of Jo Daviess County in northwest Illinois in which The Galena Territory is located is unique relative to the rest of the State of Illinois and much of the Midwest because it is part of the Wisconsin Driftless Region bypassed by the last continental glacier 12,000 years ago. Glaciers surrounded, but did not pass over the area. The relief from the area's high ridges to the valley floors is typically 300 feet or more creating a rugged and scenic landscape. Because of its geologic history, Jo Daviess County has among its elevations most of the highest points in Illinois. Charles Mound, with an elevation of 1,235 feet, is the highest point in Illinois and is located 6 miles north of The Galena Territory. The Village of Stockton, located approximately 20 miles east of The Territory, is Illinois's highest town. [The information in the foregoing paragraph was excerpted from the Jo Daviess County Comprehensive Plan, 1999.]

The Galena Territory was developed on rolling, heavily wooded land with some open areas formerly used as farm land. Although development has changed the landscape significantly, its original character is still visible in its wooded ridges and more open valleys. Within The Territory there are substantial elevation differentials, as much as 400 feet from Lake Galena to the highest point in The Territory, which create extensive scenic vistas throughout the community.

#### **Development History**

The Galena Territory is a planned residential/resort community located approximately 8 miles east of Galena, IL. It was developed by the Branigar Organization, Inc., beginning in 1970 and continuing under Branigar's direction until 1990 when the company sold its last property interest in The Territory. The Branigar Organization created a Master Plan for the development of The Territory containing a variety of uses, including areas for single-family homes and multi-family living units on lots ranging from ½ acre to several acres in size; Lake Galena; substantial open space; and Eagle Ridge Inn (now known as Eagle Ridge Resort and Spa). The Plan called for the development of 6,800 acres with 20 percent of the land area set aside as green space. Originally there were 3,257 lots planned for The Territory at an overall gross density of one residential unit per two gross acres. A more detailed description of the early history of The Galena Territory can be found in the publication The History of the Galena Territory by Norene Harber Purcell, the wife of Lester L. Harber who was a Vice-President of The Branigar Organization, Inc. and the Project Director of The Galena Territory from the inception of the project until his death in May 1981.

Implementation of the Master Plan was accomplished incrementally. The Shenandoah Riding Center, Eagle Ridge Inn, Lake Galena, and the North Golf Course were developed early along with the initial plats of subdivision for single family homes and condominium townhomes and apartments. The South Golf Course and East Golf Course, successive plats of subdivision for single family homes, and additional condominium townhomes were developed in the 1970's and 1980's until the Branigar Organization concluded its development activities in 1990. Eagle Ridge Inn was substantially reconstructed following a fire and the General Golf Course was

developed after the Branigar Organization sold its interests in The Galena Territory.

In 1996 an additional 212 acres of land, commonly known as the Vincent Farm, was added to the Galena Territory. Subsequently, 12 lots were subdivided from the 212 acre parcel and sold to off-set part of the original cost of the 212 acres. In both cases, the Galena Trading Corporation, a wholly owned subsidiary of the Galena Territory Association, was the entity that purchased the original 212 acres as well as subdivided the 12 lots.

## **Governance**

The Branigar Organization created The Galena Territory Association (GTA), a not-for-profit Illinois corporation, as a part of the General Declaration of Covenants and Restrictions dated July 23, 1973. The GTA: owns, operates, and maintains the common properties and amenities transferred to it by the Branigar Organization and other properties and amenities the Association has acquired and developed since that time; administers and enforces the covenants and restrictions as set forth in the Declaration; and collects and disburses the assessments and charges as provided in the Declarations. The properties and amenities of the GTA are described in the next section of this Plan.

Membership in the GTA is mandatory for all owners of vacant lots and single-family and multi-family homes. The GTA is managed by a nine-member Board of Directors (Board) elected by the membership. The governing documents include: the General Declaration of Covenants and Restrictions and any Supplemental Declarations recorded by the Branigar Organization, and the By-Laws of The Galena Territory Association, Inc., both of which can only be amended by a vote of the membership. Additionally, pursuant to the By-Laws the Board has established Rules and Regulations governing the use of common properties and amenities and the conduct of the members of the association and their guests.

The General Declaration of Covenants and Restrictions setting forth provisions for the common benefit of all owners in The Galena Territory has been recorded. These Covenants and Restrictions set forth the permitted uses and additional provisions which may be deemed desirable with respect to property. The Declaration provides for the preservation of natural beauty, value, and amenities within the development. Included in this document are architectural review controls to keep The Galena Territory ecologically sound and aesthetically pleasing.

In addition to the provisions of the Declaration of Covenants and Restrictions relating to architectural review, the GTA has adopted Architectural Guidelines and Review procedures for The Galena Territory for the purpose of establishing guidelines for property owners, architects, and builders for matters relating to the design and construction of homes in The Galena Territory.

An Architectural Review Committee was established and operated by the Branigar Organization until January 1, 1991, when control was transferred to the GTA. The Committee's purpose is to approve the size, type, style, quality, and exterior appearance of buildings and other structures.

In addition to the Architectural Review Committee, the By-Laws establish four (4) other

Standing Committees: the Nominations Committee; the Budget and Audit Committee, the Legal, By-laws, and Arbitration Committee; and the Long Range Planning Committee. Additionally, there are several other ongoing committees performing specific functions on behalf of the GTA.

## **GTA Services, Galena Trading Corporation, and Galena Territory Foundation**

The GTA is involved in a variety of activities related to the operation and maintenance of the common properties and amenities and the provisions of services that benefit all residents and property owners. Activities related to the operation and maintenance of common properties and amenities are provided by the GTA and services to residents and property owners are provided through the GTA's wholly owned subsidiary corporation, the Galena Trading Corporation (GTC).

### GTA Staffing and Services.

Services of the GTA generally fall into six (6) general areas: administrative, maintenance, recreation and activities, architectural review, security, and solid waste disposal. In addition to numerous member volunteers serving on committees and supporting the programs and activities of the GTA in many ways, the GTA employs a staff to support its many programs and activities. In 2006, the GTA's full-time staff was 34 and its part-time/seasonal staff was 45 during peak season (summer). Staffing levels vary from year to year depending on budgetary and programmatic considerations. Staffing includes the following areas: Administration, Architectural Review, Recreation, Maintenance and Member Services, Lifeguards, Fitness Center, Snack Bar, Website, Marina, Greenspace, Housekeeping and Security.

Work performed by staff in the various GTA functional areas includes:

**Administration:** The staff in the administration offices handles the billing and collection of annual assessments, distribution of amenity tags and photo identification cards, key retention program, payroll, web site maintenance, docking assignments, annual meeting arrangements, accounts payable, accounts receivable, member services, etc.

**Recreation and Activities:** The GTA initiated this department to organize many events and activities for the young and the young at heart. Flyers are posted at the various amenities and activities are promoted in the Territory Times and on the website.

**Architectural Review:** This department has been charged in the Declarations with the responsibility to "assure that any improvements or changes in the properties will be of good and attractive design and in harmony with the natural setting of the area and will serve to preserve and enhance existing features of natural beauty." It also states in the Declarations "Prior written approval shall be obtained from the Committee with respect to all matters stated in this Declaration as requiring such approval. In addition thereto, no building, fence, wall or other structure shall be commenced, erected or maintained upon the properties, nor shall any exterior addition to or change or alteration therein be made, nor shall any clearing of trees or change of property grade be made until the plans and specifications...have been submitted to and approved in writing by the Committee." The department will answer any questions a property owner might have regarding any type of

construction in The Galena Territory and will assist in any way in which it can.

**Maintenance and Member Services:** This department handles the maintenance of the common properties and amenities. Employees in this department also perform member services provided through the Galena Trading Corporation. In the GTC member services program, these employees will perform such tasks as lawn mowing, snow plowing, exterior staining, interior painting, and minor household repairs. This program was started in response to many members reporting difficulty in getting workmen to come to their home to handle the little jobs.

**Security:** This department is on duty 24 hours per day, 365 days per year. Security staff is always there to serve you! They monitor the heat light and Community Watch programs, assists members and guests.

**Solid Waste Disposal:** Although not a department of the GTA, it is a service that is provided and maintained for all property owners and guests. There are currently three (3) solid waste disposal facilities located in The Territory: Mt. Hope Road located at the intersection of Mt. Hope Road and Thunder Bay Road near the dam; Brodrecht Road south of the Shenandoah Riding Center; and Marina Drive near the Marina. 78.2% of all waste (trash and recycling) is disposed of at the Mt Hope Road disposal facility; 11.2% is disposed of at the Brodrecht Road location, which also has a recycling container; and 9.6% is disposed of at the Marina location, which does not have any recycling capabilities. Annually, there is a hazardous material waste pick-up available to property owners to utilize for the proper disposal of a variety of materials and products considered as hazardous waste and not permitted to be disposed of in the solid waste collection facilities. Although there is currently not a yard/landscape waste disposal program (yard/landscape waste is not permitted in the solid waste disposal facilities), establishment of a yard/landscape waste disposal program is being discussed.

GTA Website, [www.thegalenaterritory.com](http://www.thegalenaterritory.com).

The recently developed GTA website offers a wide variety of information about the GTA and can be used as an educational tool as well. It features photographs of wildlife, birds and mammals as well as scenery found in the Galena Territory. Members can pay GTA invoices; access the rules and regulations; covenants and restrictions; and bylaws. They can find many forms necessary for registering to participate in the many programs offered by the Association. In the future, members may be able to utilize the website to access assessment and member service invoices, take surveys, vote on referendums, vote for the board of directors, and any bylaws changes before the membership. A live video feed of the Annual Meeting or even monthly Board meetings may be added in the future.

Continued growth of the revenue stream from the website is anticipated not only from commercial advertisers but from property owner utilization of the classified advertising section for not only personal items for sale but real estate as well. Our goal is to continue to add resources to the website to expand its use and make it even more interactive so it becomes one of the primary tools for communicating with the property owners.

Galena Trading Corporation

The Galena Trading Corporation (GTC) was established in 1996 as a wholly-owned subsidiary of the GTA. The GTA Board of Directors also serves as the board of directors for the GTC.

Created on a recommendation by the GTA accountants and tax attorneys to protect the GTA's not-for-profit homeowner association tax status, the GTC was designed to separate the for-profit activities of the GTA for tax purposes. Some of the for-profit activities operated by the GTC include the Member Services Program, Marina, Territory Times publication, lease of Shenandoah Riding Center and the snack bar.

The GTC also owns the property known as the Vincent Farm which is approximately 185 acres, 110 of which is set aside in the Crop Reserve Program with the USDA. The farm also houses a small farm house with outbuildings which are rented.

### Galena Territory Foundation

The Galena Territory Foundation was incorporated in 2000 for the Lend a Hand Scholarship contributions so that they would be tax deductible by the contributors. Since that time, the Belden School Restoration has come under the same umbrella. When established, the GTF was overseen by the GTA Board. In 2006, the Board established a separate Board for the GTF consisting of five (5) property owners. That Board will take over it's duties in 2007.

## **Properties and Amenities**

The GTA owns a number of facilities and amenities that it operates and maintains on behalf of all property owners and a large amount of open space involving both active and passive use. Following is a description of these properties, facilities, and amenities and the significant issues and concerns related to them appropriate to the Long-Range Plan.

### Galena Territory Owner's Club.

The Galena Territory Owner's Club is the center of activity for the GTA and property owners. The principal activity areas of the Owner's Club include: administrative offices, social hall, lounge, gymnasium, game room and video game room, swimming pool, fitness center, and arts and crafts room. Activity areas outside of the Owner's Club include: tennis courts, playground equipment, and an outdoor basketball court. Wireless internet access is available at the Owner's Club as well as a computer system of property owner use.

Many property owner activities are held at the Owner's Club throughout the year as well as private rentals. The Social Hall is divisible into three sections along with a supporting catering kitchen. These rooms are available for Association events as well as private rentals. Maximum capacity is based on room set-up and the number sections used. The Lounge features a small

library and kitchenette, large screen TV, DVD player and VCR player. This room is available to rent throughout the year and seats up to 50. The Arts and Crafts Room offers tables, chairs and a small sink available. Maximum capacity is 49 people.

## Lake Galena.

Lake Galena is a 225 acre man made lake constructed in 1974 by the damming of Small Pox Creek. The Lake Galena retention basin and dam are designed to withstand a 1,000 year flood. The average depth is 12 feet with the deepest spot at 50 feet close to the dam. The dam is 1150 feet across and 280 feet wide at base; the spillway is 200 feet wide; and the waterfall is 40 feet high. It is a no wake lake with boat motors limited to a maximum of 10 hp.

Lake Galena is intended to be a wilderness lake with most of the shoreline devoted to greenspace. There is no shoreline docking, docking is available only at the Marina. There is no swimming in the Lake. The Lake is subject to Illinois Department of Natural Resources (IDNR) regulations and Illinois fishing licenses are required.

There is a fish stocking program in place and electroshock is used in the lake for study and recommendations on what needs to be stocked on an annual basis. Current species are: Large Mouth Bass, Small Mouth Bass, Walleye, Muskie, Perch, Catfish, Crappie and Bluegill. Creel limits are in effect.

Because the Lake is man made and receives most of its water from the run off from area farm fields, the Lake is subject to receiving large quantities of silt. Regular dredging is required to maintain appropriate depths for boating and fishing. Also, when receiving run off from surrounding farm fields and farming operations, Lake Galena receives nutrients from fertilizer and farming operations that results in excessive weed growth in the Lake requiring regular cutting. Each of these problems will be continuing and require the ongoing attention of the GTA if this valuable asset is to be preserved.

## Marina.

The Marina is the heart of Lake Galena activity during that time of year that the Lake is most usable. The Marina has in-water docking for 311 boats and dry storage for 271 boats and 40 canoes. The GTA has a rental fleet consisting of pontoons, motorboats and canoes. Discounts are offered to property owners and their guests only if they provide a photo ID card. You must be 18 years old to rent a boat.

The Marina Building contains a well-stocked tackle shop for those fishermen in need of extra lures, bobbers, or perhaps a brand new rod and reel. Bait (except minnows) is available from a vending machine 24 hours per day. Minnows are available only during the hours the Marina Building is open. Rental fishing poles are available for members and guests without one. Pop, bottled water, chips, ice cream and microwavable sandwiches are also sold at the Marina Building. Alcoholic beverages are not available.

A small meeting room is available for use at the Marina Building when it is not being rented. No kitchen facilities are available. Capacity of this room is 35 people.

For property owner's renting dry storage space or who may trailer their boat to the Lake, a launching ramp is available. An annual fee is required and only those boats owned by property owners are allowed on Lake Galena.

### Marina Park

Marina Park adjoins the Marina and contains a variety of facilities and equipment, including: two (2) tennis courts; playground equipment located on a sand beach, this playground is suitable for children of all ages; sand volleyball and badminton nets at the beach with equipment available at the marina; two (2) regulation horseshoe pits with horseshoes available at the marina; barbecue grills and picnic tables near the beach and pavilion; two (2) regulation size bocce ball courts with bocce balls available at the marina; and hitching posts for the convenience of horseback riders.

A Picnic Pavilion is available for GTA sponsored activities as well as for rental for private parties. When not in use for a private party, property owners and their guests are welcome to take advantage of the building. There are rest room facilities near the picnic pavilion.

Shoreline fishing is available for those not wishing to rent a boat. There is no fishing from the marina docks. Fish cleaning station is available next to the Marina parking lot including a stainless steel garbage disposal designed to eliminate waste from cleaning fish.

### North Cove Park.

North Cove Park is located off W. Guilford Road near Thunder Bay Road. It contains a picnic area with picnic tables and barbecue grills, shoreline fishing, and hitching posts for horseback riders. Boat docking and launching is prohibited at North Cove.

### Thunder Bay Falls Park.

Thunder Bay Falls Park is located off Thunder Bay Road near Mt. Hope Road and as the name implies is at the Lake Galena Falls as the Lake water re-enters Small Pox Creek. This Park features shoreline fishing, picnic tables, and benches that overlook the dam and spillway. Thunder Bay Falls Park is the newest recreation facility of the GTA and continues to be under development.

### Green Space and Trail System.

Green space and the trail system represent one of the unique natural and recreational features of The Territory. There is 1700 acres of greenspace and over 20 miles of paved and unpaved trails. The trail system is a wilderness system that meanders through the unique topography and the abundant plant and wildlife of The Territory. Traveling on the trails can bring one close to nature. Woods and meadows are lush with grasses, flowers, ferns, shrubs and trees from May through October. Woodland wildflowers are especially beautiful among limestone outcroppings and under the ancient oaks and hickories that inhabit the woods. Wild turkey and white tail deer are frequently seen along with an occasional fox, coyote and other small animals. Hawks, turkey vultures and occasional osprey and eagles soar overhead. A Nature Trail Guide and Map are available at the Owner's Club to assist with trail finding and the identification of natural features that may be found along the way.

In addition to trails, scattered throughout The Territory are rare prairie remnants and prairie reconstruction sites. The Greenspace Committee and individual volunteers are consciously planning and working on the preservation and/or reconstruction of these unique prairie spaces.

## Shenandoah Riding Center.

The Shenandoah Riding Center is one of the oldest GTA facilities and amenities. Originally constructed by the Branigar Organization, the Riding Center was transferred from Branigar to the GTA in December 1991 along with approximately 108 acres of land. After directly operating the Riding Center for many years, the GTA leased it to private operators in March, 2005.

The major features of the Riding Center include: indoor boarding stalls for 48 horses; an 80ft. wide by 120ft. long indoor arena; a 135ft. wide by 495ft. long outdoor arena; two offices; an upper level lounge, kitchen, and storage area; and various other areas and facilities commonly associated with a full-service riding center. Even though the Riding Center is in generally good physical condition, because of its age and use, the Riding Center represents a continuing and long-term maintenance challenge for the GTA that will require some thoughtful planning and resource allocation.

As a full-service facility, the Riding Center offers:

**Trail Rides:** Offered daily by the private operator. The private operator should be contacted for specific information regarding trail rides. Discounts are offered to property owners and their guests if they provide an amenity tag or photo ID card.

**Lead Lines Rides:** These rides are for those children who want to ride a horse but are too young for a trail ride.

**Boarding:** Shenandoah offers pasture, stall, and overnight boarding. Contact the private operator for current rates and details.

**Kid's Camps:** Every summer Shenandoah offers both English and Western Kid's Camps at a variety of riding levels available. Class size is limited and reservations are required

**Clinics:** Throughout the year Shenandoah features clinics of all types and in all of the various riding disciplines. These clinics change annually.

**Riding Lessons:** Horseback riding lessons are available. Contact Shenandoah for details and rates.

## Maintenance Facilities

The maintenance facility is located at the end of Marina Drive near the Marina Building. The maintenance shop was originally built in 1979 as the location for the fire department until a new station was constructed on Territory Drive. The main maintenance building was expanded in 1987 and again in 1996 to a total of approximately 5300 square feet. The maintenance complex also includes two cold storage buildings at 3200 square feet each, and two other small storage buildings at 240 square feet each. Together, they house nearly \$1million in equipment including trucks, tractors, mowers, and small tools.

## Belden School.

Belden School is a one room limestone schoolhouse built in 1859. It was an active schoolhouse from 1859 to 1943 when it closed. The schoolhouse sits on approximately one acre of property owned by the GTA at 52 Heatherdowns Lane.

The schoolhouse is currently being restored by Belden School Restoration Committee. The plan to restore it to its early 1900's condition and open an Interpretive Center to welcome property owners, school groups, charitable organizations, and tourists.

## **Eagle Ridge Resort and Spa**

The Eagle Ridge Resort and Spa is a private resort complex within The Galena Territory. The Resort and Spa includes: an Inn with 80 guest rooms, a restaurant and lounge, a conference center, indoor pool and spa, exercise room, a clothing store, a game room, and a real estate office. Guests of the Resort and Spa have use of the facilities of Lake Galena and the Shenandoah riding center for a fee.

Golf is a principal activity of the Resort and Spa. There are three 18-hole golf courses, the General, North, and South Courses, with pro shops and related facilities and one 9-hole course, the East Course, with a pro shop. The North Course also has a winter nordic ski center and South Course has winter indoor golf center and winter sports activities. The East Course has 9 holes and includes a golf academy classroom..

There is also a general store and numerous opportunities for tennis (including lessons), volleyball, horseshoes and hiking.

## **Rental properties**

As a part of the recreation and resort nature of The Galena Territory, within The Territory many privately owned single-family homes and town and lake home condominiums are available through individual owners and various rental agencies. In January 2000, Jo Daviess County passed a "Guest Accommodations Ordinance" licensing short-term rental accommodations throughout the County. As of February 2006, there were 485 rental homes and condominiums licensed by the County in The Galena Territory.

The Branigar Organization, when developing The Galena Territory, realized that to get people to come and be exposed to the natural beauty of the area some sort of overnight accommodation would be a self-selling tool for the properties for sale. Branigar developed and built the first single and multi-family homes for just that purpose. The availability of rental properties continue to be one of the major selling tools to expose new buyers to the area and to maintain an available pool of new buyers and grow property values.

A self-policing agreement, "Memorandum of Understanding", for maintaining residential quality of the neighborhood was signed by all the major rental companies in 2001. New rental company owners and new owners of current rental companies are encouraged to become familiar with this document and agree to its terms.

## Demographics

Number of building lots and owners. As of December 2006, there are 3270 building lots, including building lots for both single-family homes and multi-family dwellings, in The Galena Territory and 4078 owners. Many owners have more than one lot; for instance, 311 owners control 859 properties. Most of these owners are holding extra lots for privacy and to protect the open space character of their property. Additionally, it is estimated that approximately 200 lots are owned by Galena area residents or condominium owners who maintain ownership to have access to the amenities and benefits available to GTA members.

Projected number of homes. At the end of 2006, there were 2155 homes in The Galena Territory which represents a build-out of 66% of available building lots. Of the 2155 homes, 1672 or 78% are single-family homes and 483 or 22% are multi-family dwellings. Assuming that the average annual rate of development of the past 10 years continues over the next 10 years, in 2010 it is estimated that there will be a total of 2393 homes/dwellings in The Galena Territory representing a build-out of 73% and in 2015 there will be 2693 homes/dwellings representing a build-out of 82%. Given the number of owners that own two or more building lots who indicate that it is their intention not to build on the vacant lots that they hold and the number of lots held for amenity use, it is anticipated that The Galena Territory will reach maximum build-out by or before 2015. The following table indicates the estimated number of single-family homes and multiple-family dwellings as a percentage of total dwellings for 2005, 2010 and 2015.

	<b>Dec. 2006</b>		<b>Dec. 2010</b>		<b>Dec. 2015</b>	
Single-family homes	1672	78%	1910	80%	2210	82%
Multi-family dwellings	483	22%	483	20%	483	18%
Total dwellings	2155		2393		2693	

Projected population. The population of The Galena Territory consists of two types – permanent resident population and part-time/weekend resident population. Both types of residents reflect the dual nature of The Galena Territory as an increasingly popular retirement community and as a resort/recreation community.

Permanent resident population. In December 2006, there were 469 single-family homes in The Galena Territory occupied on a full-time basis, or at least for a major portion of the year, or 28% of total single-family homes. Since The Galena Territory is not incorporated and therefore a specific census of Territory residents was not taken in 2000, one can only estimate the permanent resident population. Using the average family size of 2.26 persons per household for the Census Tract in which The Galena Territory is located it is estimated that the permanent resident population is 1060 in December 2006. Assuming that the percentage of permanently occupied single-family homes continues to be 28% of the total number of single-family homes (this percentage has actually increased from 24% in 2003) and the average family size remains at the year 2000 level, the estimated permanent resident population of The Territory in 2010 would be 1,209 and in 2015 it would be 1,398.

A past survey by the GTA property owners indicated that more than 45 percent of the seasonal home owners plan to retire in The Territory. If the survey results are actually reflective of owner retirement plans, the foregoing permanent population estimate may be low by the time of final build-out. Because this trend of full time residential use was not a part of the original concept developed by Branigar in 1973 and facilities were not planned for such use, the need for additional facilities and services will also increase.

Part-time/weekend population. The population of part-time/weekend owners is also difficult to estimate, but no doubt is significant given the activity that one sees during many weekends, especially in the summer. However, assuming a 60% to 80% occupancy level of all non-permanent resident housing units and an average occupancy of 4 persons per housing unit, part-time/weekend population levels could currently range from 4,000 to 5,400. Adding the estimated 1060 permanent resident population to the estimated part-time/weekend population results in a total population of 5,060 to 6,460 people on many weekends throughout the year, but especially during the spring, summer, and fall. Based on the estimated future number of housing units, in 2010 the total population on many weekends could range from 5,600 to 7,200 and in 2015 from 6,300 to 8,100.

## **External Service Providers**

Because The Galena Territory is not an incorporated municipality, many of the governmental services usually performed by a municipality within a community such as The Territory are provided by several local governmental entities and other public and private service providers. Consequently, in many respects the quality of life of Territory residents and property owners and the maintenance of property values depend on the quality and effectiveness of services provided by others. Following is a brief description of the governmental and non-governmental services provided within The Galena Territory by external public and private entities.

**Jo Daviess County.** Many of the services performed by Jo Daviess County are provided countywide in both incorporated (cities and villages) and unincorporated areas (all of the county outside of incorporated areas, including The Territory). Some County services have a more direct relationship to The Territory than others. Information about all County services may be found at the County's website: [www.jodaviess.org](http://www.jodaviess.org). Those County services that have a more direct impact on The Territory include:

**Law Enforcement.** The Sheriff is the principal law enforcement officer of the County and is a full-time elected office holder. The Sheriff's Office provides direct law enforcement and public safety services in the unincorporated area of the County, including The Territory. In addition to countywide law enforcement and public safety services, the Sheriff's Office is responsible for operating and maintaining: the Public Safety Building, including the County Jail; the Emergency Enhanced 9-1-1 Communications Center providing communications and dispatching services for all fire, medical, and law enforcement agencies throughout the County; and the Courthouse, including providing general internal security as well as special security for the Circuit Court Systems.

In terms of general law enforcement and public safety services, the Sheriff's Office has a staff of 19 (including the Sheriff) full-time sworn officers providing services to a county with an area in excess of 600 square miles with over 900 miles of County and township roads. Because current staffing levels result in only 2 to 3 officers on duty at any given time during a 24 hour period, the Sheriff's Office is not able to provide regular "patrol" service within The Territory as one might find in an incorporated city or village. Consequently, The Territory's Security Service, in part, becomes the "eyes and ears" of the Sheriff's Office and can request law enforcement services when needed.

**Planning.** The County maintains a countywide planning function and in 1999 adopted a countywide Comprehensive Plan. Although the Comprehensive Plan does not directly relate to the internal development of The Territory, it does relate to the development of the area around The Territory. Land development proposals considered by the County's Planning Commission and decisions made by the County Board utilize the policies and guidelines set forth in the Comprehensive Plan. In general, the policies and guidelines contained in the County's Comprehensive Plan for the protection and maintenance of the County's rural character and quality of life are consistent with goals of The Territory.

**Building & Zoning Office.** The Building and Zoning Office is responsible for administering and enforcing the County's: Building Code, Zoning Ordinance, Subdivision Ordinance, Guest Accommodations Ordinance, Telecommunications Facilities Ordinance, House Number Ordinance, Nuisance Ordinance, and Floodplain Regulations; and provides administrative support for the Planning Commission/Zoning Board of Appeals.

**County Highway.** The Highway Department, under the management of the County Engineer, is responsible for construction and maintenance of 186 miles of County highway, but provides limited direct services to The Territory since there are no county roads within The Territory over which the Department has jurisdiction. However, the Department is responsible for township projects constructed or maintained with Motor Fuel Tax funds and provides, on request, technical assistance to township road commissioners. The Department also performs traffic studies on all County and township roads for the purpose of establishing speed limits which must be approved by the County Board.

**County Assessment Office.** The County Assessment Office, under the supervision of the Chief County Assessment Officer (C.C.A.O.), performs a variety of functions that directly and indirectly relate to the assessment of property in The Territory for property tax purposes. These functions of this Office and the C.C.A.O. include: holding an annual assessor' meeting to instruct the township assessors in uniformity of assessment; maintaining an up-to-date property assessment record system; reviewing all assessments made by township assessors and revising them as may be required; examining the assessments in the county and equalize by increasing or reducing the assessment of property in the county, any area, or any class of property so that the assessment will be 33 1/3 percent of market value as required by the State of Illinois; overseeing the application process for exemptions – homestead improvement, non-homestead and senior citizen assessment freeze homestead exemption; mailing notices to each taxpayer whose assessment has been changed and publishing such assessment changes for each township;

serving as chairperson of the Farmland Assessment Review Committee; and serving as the clerk of the Board of Review.

**Board of Review.** The Board of Review performs an important function relative to property assessment both at a general level of property assessment review and at a specific level of review when an individual property owner requests review of their property assessment. Although the Board has the responsibility of reviewing all assessment records of the County and the duty to equalize assessments by township within the County, the Board is best known for its work in reviewing individual property assessments based upon an appeal from a property owner. In the review of individual property assessment, the Board may increase or reduce any assessment, as it determines is appropriate. The Board of Review consists of three (3) members appointed by the County Board.

**Health Department.** The Health Department, under the management direction of the Health Administrator, provides health protection programs in four areas as required for certification by the Illinois Department of Public Health: water quality, food sanitation, private sewage disposal, and communicable disease. The Department is also a licensed Home Health Care Agency that provides intermittent skilled nursing, speech therapy, physical therapy, occupational therapy, social worker and health aide care. Home Health Care is funded through reimbursement from Medicare, Medicaid, private insurance, and private pay. The Department is governed by the Board of Health whose members are appointed by the County Board.

### **East Galena & Guilford Townships.**

The Territory falls within both East Galena and Guilford Townships. Road maintenance, including the road surface and adjoining right-of-way, and property assessment are the two principal township based services provided to The Territory.

**Road maintenance.** Each township has an independently elected Road Commissioner who is responsible for township road maintenance, including road surface maintenance, snow plowing, right-of-way mowing, and drainage maintenance in the right-of-way. The Territory contains 62 miles of township maintained roads.

Each Township Road Commissioner determines the level of road maintenance that will be provided in their respective township. Consequently, road and right-of-way maintenance may vary between the two townships and therefore vary within The Territory depending on which township one's home is in.

**Property assessment.** The assessment of property in The Territory for property tax purposes is the responsibility of an independently elected Township Assessor in East Galena Township and an independently elected Township Assessor in a Multi-Township Assessing District consisting of Council Hill, Guilford, and Scales Mound Townships. The work of each of these Township Assessors is subject to review by the County Assessment Office to assure compliance with State of Illinois assessment requirements and is subject to review by the Board of Review should a property owner want to appeal

his/her property assessment.

## **Fire Protection.**

Fire protection for Territory properties is provided by three (3) fire protection districts, the Elizabeth Community Fire Protection District and the Scales Mound Fire Protection District. A small portion of The Territory, the 12 lots subdivided from part of the Vincent Farm, is in the Galena Rural Fire Protection District. Each of the fire protection districts are governed by a board of directors appointed by the County Board.

The Scales Mound Fire Protection District serves most of The Territory. Its main headquarters building is located in the Village of Scales Mound approximately five (5) miles north of The Territory. A second Scales Mound station is located in The Territory adjoining the Owner's Club property on land provided by the GTA. The District is a volunteer fire protection district with approximately 55 volunteers, 24 of whom are at The Territory station. Because it is a volunteer district, neither the headquarters station nor The Territory station is routinely manned. The District has 18 pieces of equipment including equipment located at The Territory fire station.

The Elizabeth Fire Protection District serves approximately the southern 1/3 of The Territory. Its main headquarters building is located in the Village of Elizabeth approximately eight (8) miles east of The Territory. The District is also a volunteer fire protection district with approximately 30 volunteers. The District has 10 pieces of equipment.

## **Emergency Medical**

Emergency medical service is provided by the Galena Area Ambulance (GAA) service headquartered next to the existing Galena-Stauss Hospital and Healthcare Center in Galena and is operated by approximately 45 volunteers. There are approximately six (6) members of the GAA that reside in The Territory and when available respond directly from their homes. Galena Territory Security also responds to ambulance calls in the Territory carrying oxygen and monitoring equipment with them. Response time to The Territory is estimated at 7 to 10 minutes depending on location of the call and the weather. Emergency room care is currently available at the Galena-Stauss Hospital and Healthcare Center. The ER facilities at Galena-Stauss are in the process of being upgraded and is currently staffed around the clock by ER doctors from the University of Illinois Medical Center at Chicago. More serious medical emergencies are handled at the trauma center in Dubuque, approximately 20 minutes west of Galena, or may be transferred to medical facilities in Iowa City, Madison, the Quad Cities, or Rockford by air ambulance.

## **Water and Sewer**

Except for a few properties in the eastern portion of The Territory, all properties in The Territory are served by a community water system owned and operated by Galena Territory Utilities, Inc., a subsidiary of Utilities, Inc. one of the largest privately owned water utilities in the United States. The water system consists of six (6) wells with a total pumping capacity of 1,160 gallons per minute and four (4) ground-level reservoirs with a total storage capacity of 337,000 gallons. The area south of Lake Galena (the Eagle Ridge and Shenandoah areas) or interconnected into a

grid system while the area north of Lake Galena (the Thunder Bay area) operates independently. A 300,000 gallon manmade reservoir located near the Eagle Ridge Inn services three (3) dry fire hydrants around the Inn.

The community sewerage system is also owned and operated by Galena Territory Utilities, Inc. and covers only that part of The Territory known as the “resort core” which includes Eagle Ridge Inn, the various golf course club houses, the townhome and apartment condominiums, and several areas of single-family homes. The sewerage system utilizes a sewerage treatment plant located off Thunder Bay Road to treat collected waste water. Plans are currently underway to connect the Territory Owners’ Club to the sewerage system.

## **Electric**

Electric service in The Territory is currently provided by Alliant Energy and Jo-Carroll Energy, Inc. Jo-Carroll Energy, Inc. (Jo-Carroll) presently provides electric service to a large portion of The Territory. Jo-Carroll is a member-owned, not-for-profit cooperative. Therefore, homes in The Territory that are served by Jo-Carroll are member-owners of Jo-Carroll. As a not-for-profit cooperative, Jo-Carroll’s mission is to provide reliable electric service at the lowest practical cost. Headquartered in Elizabeth, Illinois, Jo-Carroll presently has about 7,500 electric accounts.

Jo-Carroll is presently acquiring the service area of Alliant Energy in northwest Illinois. This acquisition will add about 13,000 electric accounts in Jo-Daviess, Carroll and Whiteside counties of Illinois. It will also have the effect of making all of the homeowners in The Territory Jo-Carroll members. The acquisition transaction should close by January 2007. All future homes built in The Territory will be served by Jo-Carroll under its present line extension policies and future homeowners in The Territory will become member-owners of Jo-Carroll.

## **Gas.**

Natural gas service is not available in The Territory. Home and hot water heating and cooking generally utilize propane gas (in some cases electricity is used). Propane gas is available through the GTA’s cooperative gas purchasing program and through a number of other suppliers. The GTA’s cooperative gas purchasing program currently has 1250 customers.

## **Communications.**

The Territory is served by a variety of communications providers. Conventional land line telephone services for property owners with Galena land telephone exchanges (777 and 776) are serviced by AT&T and Elizabeth telephone exchanges (858) are serviced by Verizon. In February 2007 a new Area Code overlay number “779” will go into effect for all telephone customers in The Territory. The new Area Code will require a new dialing procedure with which Territory residents should become familiar. Cellular service to the area is provided by US Cellular and Verizon. Arrangements for cellular service can be made either by using the respective websites or by visiting a local outlet. US Cellular has outlets in Galena and Dubuque, IA, and Verizon has outlets in Dubuque, IA and Savanna, IL.

Several options are available for property owners for high speed internet service. For those owners that have cable TV access, Mediacom Communications provides the fastest internet services speeds available locally through its cable TV service. Jo Carroll Energy, Elizabeth, IL. provides high speed wireless internet services for those owners who have a line-of-site to various towers maintained by Jo Carroll Energy. Some owners areas are not able to access a strong enough signal due to the hilly terrain geography, so each site needs to be tested beforehand to determine availability. If the signal is sufficiently strong, then a small antenna is mounted on the house roof to communicate with the tower. Some owners may also be able to receive DSL high speed internet services through their residential telephone line through Lightedge Solutions (formerly Internet Express), Moline, IL. Finally, internet service can be provided thru a satellite TV service, both Direct TV and Dish Network offer high speed internet service for an additional cost.

The hilly terrain and long distances from television broadcast towers make TV reception with a regular antenna difficult, although possible, and offers only a selection of national broadcast networks. Cable TV service, through Mediacom Communications, and satellite TV service, through Direct TV and Dish Network, is highly utilized throughout The Territory. All services can provide high definition (HD) TV.

### **Health/Hospital Services.**

The Territory is served by several hospital facilities in the region. In the immediate area is Galena-Stauss Hospital and Healthcare Center in Galena. Galena-Stauss is currently in the process of constructing a new \$38 million hospital facility on a 35 acre campus one-half mile northwest of Galena on Rt. 20 that will know as the Midwest Regional Medical Center, replacing a hospital facility that has served the community for 40 years. Located 2.4 miles west of the existing facility, Midwest Regional Medical Center will remain a designated Critical Access Hospital, which means it will not exceed 25 beds and receive enhanced reimbursement from the Centers for Medicare and Medicaid Services (CMS). The new facility will provide area residents with a much broader range of services including advanced diagnostics and surgery. With a unique and model strategic alliance with the country's largest medial school (the University of Illinois), JoDavie's County will have convenient access to a higher level of specialty care, the latest in medical technology, and quality healthcare in a state-of-the-art facility designed specifically with patient-centered care at the core of operations. In addition to the hospital, a medical office building will serve existing area physicians and provide space for specialty services and the telemedicine healthcare network program currently under development with the University of Illinois. The Galena-Stauss fitness center will move to the new facility as well as all laboratory, radiology, and outpatient services such as physical therapy. The current Galena-Stauss facility will remain home to Galena-Stauss' long-term care programs, including adult day care, assisted living, and the nursing home, and will be named the Galena-Stauss Senior Care Community.

Other medial centers in the region serving the needs of Territory residents and property owners include: Mercy Medical Center and The Finley Hospital both located in Dubuque. Mercy Medical Center is a member of Trinity Health System and includes: a Cardiology Center, a Women's Health Center, Orthopedic and Rehabilitation Services, Sleep Lab, and a Birthing

Center with Neo-Natal ICU. Its Emergency Room is a level II trauma center. They also house the Tri-State Surgery Center for outpatient surgery and provide a full range of inpatient surgery. The Finley Hospital is member of the Iowa Health System and includes: the Wendt Regional Cancer Center, the Diabetes Center, a Weight Management Clinic, a Pain Clinic, the Summit Health Center for older adults with psychiatric needs, and a Birthing Center with Level II nursery. It also has an Emergency/Trauma Center and provides a full range of inpatient surgical services.

Galena area medical care is provided at two health clinics, Medical Associates Clinic and the Galena Health Clinic. The Medical Associates Clinic includes four (4) full-time family practice physicians. They are a part of the multi-specialty network of Medical Associates Clinic in Dubuque and are affiliated with Galena-Stauss Hospital and Healthcare Center, Mercy Medical Center and The Finley Hospital in Dubuque. Medical Associates Clinic recently opened a satellite office in Elizabeth.

The Galena Health Clinic includes two full-time family practice physicians. They are a part of the Tri-State Independent Physicians Association and are also affiliated with Galena-Stauss Hospital and Healthcare Center, Mercy Medical Center and The Finley Hospital in Dubuque.

Other medical service available in the Galena area are five (5) dentists, two (2) optometrists, and two (2) chiropractors.

## **Education.**

The Galena Territory is served by three school districts – Galena Public School District #120, River Ridge Public School District #210, and Scales Mound Public School District #211. The boundaries for these school district were established long before The Galena Territory was envisioned and built. School district boundaries were originally set to match farm ownership and boundaries. Once set, no one really paid any attention to them. And, no one had a clue the Territory would come along and evolve into what it has.

To give some geographic perspective, a small portion of the western side of the Territory is within the boundaries of the Galena School District. Then, you can take the remainder of the Territory and somewhat divide it with a horizontal line to split the area into the remaining two school districts. The section north of this line is in the Scales Mound School District. The properties to the south of this line are in the River Ridge School District.

The following provides more specific information about each school district.

### Galena School District 120

The district has a three building campus and stadium west of downtown.  
There is a building for the primary, middle, and high schools  
Enrollment is: Primary – 354, Middle – 222, High – 256. Total 832

### Scales Mound District 210

The district has a K-12 building in the main part of the town.  
Enrollment is: Primary – 110, Middle – 54, High – 78. Total 242

### River Ridge School District 211

This district has the newest campus with the K-12 building and stadium located between the towns of Elizabeth and Hanover.

Enrollment is: Primary – 247, Middle – 111. High – 182. Total 540

The Galena Territory is a tax engine for the funding of each of these districts. The percentage of each districts annual budget that comes from the property taxes of The Galena Territory ranges from 20% to 50% plus. The GTA Education and Taxation Committee was formed to monitor the taxes levied by each district and their spending and fund balances. Since school property taxes amount to approximately 70% of each of our property tax bills, schools are an important taxing body to watch. But, it is not the Committee's only focus. The Committee is also concerned with school achievements and follows other taxing body requests to be sure they are understood by the property owners and voters in the Galena Territory.

In terms of higher education, The Territory is also included in the Highland Community College District whose main campus is in Freeport, IL, but who has opened a branch facility in Elizabeth. Highland Community College offers a variety of credit and non-credit, adult education courses and programs in which residents of The Territory may participate.

Other institutions of high education within reasonable commuting distance of The Territory include: Clark College, University of Dubuque, Loras College in Dubuque and the University of Wisconsin-Platteville in Platteville, WI.

### **Library.**

Two library districts serve the area of The Territory, although only a small part of The Territory is actually located in one of the districts, the Galena Public Library District, and the remainder of The Territory is currently outside of any library district. The Galena Public Library District consists of East and West Galena Townships and is the larger of the two library districts with a lendable book collection of 21,480 books, 255 books on tape, and 150 books on CD. The Galena Library also maintains a collection of magazines and newspapers and movies and music videos, DVDs, and CDs. Materials not contained in the Galena Library's collection can be obtained through interlibrary loan from the collections of all libraries in Illinois. Resident tax payers (the Galena Library is tax supported) can obtain a library card at the Library and non-residents may also obtain a Galena Library card for a fee of \$100 per year.

The Elizabeth Township Public Library covers of Elizabeth Township and has a lendable book collection of 11,067 books, 300 books on tape, and 200 books on CD. The Elizabeth Library also maintains a collection of magazines and newspapers and movies and music videos, DVDs and CDs. Materials not contained in the Elizabeth Library's collection can be obtained through interlibrary loan from the collections of all libraries in Illinois. Resident tax payers (the Elizabeth Library is tax supported) can obtain a library card at the Library and non-residents may also obtain an Elizabeth Library card for a fee of \$50 per year.

## Regional Context/Jo Daviess County

Jo Daviess County, in which The Galena Territory is located, is in the heart of a scenic, historic and recreational region that includes the National Register historic district of Galena and vast areas of federal and State wildlife and conservation land along the Mississippi River valley. Although river transportation and lead mining were the original economic forces shaping the region and forming the basis of its historic character, agriculture and tourism are currently the two major economic engines in the County.

In the late 1990's, Jo Daviess County recognized the need examine the changes occurring in the County relative to the impact of rural residential development on agricultural activities and the need to provide a better mechanism for managing such impacts; and the need to accommodate and promote economic development and job creation activities. The County's planning efforts in these regards culminated in the development and adoption in September 1999 of the Jo Daviess County Comprehensive Plan. The County's Comprehensive Plan is aimed at protecting the economic viability of the agricultural base and the scenic character of the countryside by discouraging rural sprawl and encouraging planned growth in areas contiguous to existing communities. The Plan contains policies which are consistent with the interests, goals and objectives of the GTA.

Jo Daviess County is basically a rural county with a population of 22,289 according to the 2000 U.S. Census of Population. As in many rural areas in Illinois and across the nation, the County has been losing population for many decades, except that in the decade of the 1990's Jo Daviess County increased in population by 468. All of this population increase, as modest as it was, can be attributed to development in the rural areas of the County. In fact, the ten (10) incorporated cities and villages in the County had a net population loss of 152. A substantial part of the County's overall increase in population is the result of the increase in permanent residents in The Galena Territory.

The Galena Territory is an unincorporated community, as opposed to an incorporated city or village, such as the City of Galena or the Village of Elizabeth, but in many ways, except for population, it is the largest community in Jo Daviess County. However, even in terms of population with an estimated population of 1060 The Galena Territory is the 5<sup>th</sup> largest community in the County. Following is a comparative population table of Jo Daviess County cities and villages.

### Jo Daviess County, IL Population of Cities & Villages U.S. Census 2000

<u>City/Village</u>	<u>Pop.</u>
Galena	3460
East Dubuque	1995
Stockton	1926
Warren	1496
<i>The Galena Territory</i>	<i>1060*</i>
Hanover	836

Elizabeth	682
Scales Mound	401
Apple River	379
Menominee	237
Nora	118

\* Est. Dec. 2006

By other measures, The Galena Territory far exceeds the size of the incorporated communities in the County. In land area, at 10.6 square miles in area The Territory is geographically substantially larger than any incorporated community in the County. In terms of number of housing units, with 2155 as of December 2006, The Territory exceeds that of the City of Galena and is the largest in the County. In terms of miles of streets/roads, at 62 miles The Territory exceeds that of any other community in the County. And finally, in terms of the assessed value of property, The Territory far exceeds that of any other community in the County and represents 25% of the total assessed value of the County. Following is a comparative table based on 2005 property assessments for cities and villages and the unincorporated area of Jo Daviess County. Because The Territory is not an incorporated community, its total assessed value and percent (%) of total County assessed value is indicated at the bottom of the table.

**Jo Daviess County, IL**  
**Property Assessed Value of Cities & Villages**  
**2005**

<u>City/Village</u>	<u>A.V.</u>	<u>% of Total County</u>
Apple River	\$ 3.759 mil.	0.57%
East Dubuque	\$ 24.971 mil.	3.82%
Elizabeth	\$ 8.622 mil.	1.32%
Galena	\$ 81.472 mil.	12.45%
Hanover	\$ 8.169 mil.	1.25%
Menominee	\$ 2.749 mil.	0.42%
Nora	\$ 1.125 mil.	0.17%
Scales Mound	\$ 4.817 mil.	0.74%
Stockton	\$ 23.819 mil.	3.64%
Warren	<u>\$ 17.831 mil.</u>	<u>2.73%</u>
Total City/Village	\$177.333 mil	27.10%
Unincorporated	<u>\$476.992 mil</u>	<u>72.90%</u>
Total County	\$654.326 mil	
<i>The Galena Territory</i>	<i>\$161.384 mil.*</i>	<i>24.73%**</i>

\* included in Unincorporated

\*\* % of Total County

## **Chapter 3**

### **Opportunities, Challenges, and Concerns**

The Galena Territory is now thirty (30) plus years old. Implementation of the Master Plan for The Galena Territory created by the Branigar Organization, Inc. has resulted in a planned community of exceptional quality. The development of many of the Territory's facilities and amenities began in 1974 and 1975 and were completed within a relative short period of time during the early stages of development, e.g. the original Owner's Club, the Shenandoah Riding Center, and Lake Galena. Other facilities and amenities were developed over a number of years as The Territory grew, e.g. the public roads, the water system, and the sewerage system.

The Territory is a community in many ways different from that envisioned by the Branigar Organization. The Branigar Organization's original concept was that of a resort/recreational, second home community with a number of recreational amenities for primarily seasonal use. Although The Territory is in many ways the resort/recreational community envisioned by the Branigar Organization, it is also a community of primary and second homes of a nature and quality not foreseen by the Branigar Organization and the permanent home for many more people than originally planned. Because of the age of The Territory, the number and size of homes, and its evolving nature as a community with a permanent population of an increasing size, a number of opportunities, challenges, and concerns need to be identified and addressed. The GTA should organize volunteer and staff resources in a manner that will effectively address each of the identified opportunities, challenges, and concerns.

**The GTA Board of Directors should identify an appropriate committee or individual (staff or volunteer) to be responsible for addressing and following up on each of the "Opportunities, Challenges, and Concerns" identified in this Chapter. Each of those committees or individuals should report at least annually to the Board about it activities relative to their assigned responsibility.**

**GTA Facilities.** The facilities of the GTA are of varied age and usage. Some date back to the early development period of The Territory, e.g. parts of the Owner's Club, including the swimming pool and gymnasium, the Shenandoah Riding Center, the Marina Building, some maintenance facilities, and some are newer, e.g. the 2004 addition to the Owner's Club. Continuing maintenance of these facilities to serve the needs of property owners must be a high priority. A thorough facilities analysis should be prepared and a multi-year plan and program developed for the continuing maintenance of these important facilities. This plan and program is directly related to the ongoing concerns with GTA finances. In addition to continuing maintenance of GTA facilities, special consideration needs to be given the swimming pool at the Owner's Club and the Shenandoah Riding Center. Each of these facilities is highly used and both, because of age, have significant maintenance concerns. **A long-term plan for the utilization and development of each of these important GTA facilities needs to be prepared to preserve their long-term value to the quality of life in The Territory.**

**Lake Galena.** The Lake was created during the development of The Territory by damming Smallpox Creek. It is approximately 225 acres in size and surrounded by Greenspace, only small portions of the lakeshore are privately owned, limiting the view of houses and other structures from the lake. Active management of the lake includes fish stocking, dredging, and erosion control. The increasing population of The Territory will put additional strain on the Lake and needs to be monitored. Increased boating and fishing have the potential to decrease fish populations and their habitat, along with increasing the pollution in the Lake. **The GTA needs to continually evaluate the health of the Lake and determine ways to mitigate the impact of an increasing population on the Lake. Existing efforts to control erosion and runoff from adjacent lands should continue and potentially be expanded to include wetland creation.**

**Natural Environment.** When The Galena Territory was laid out, 20% of the land, or approximately 1500 acres, was set aside as green space. For the first 15 years this land was left unmanaged and allowed to develop “naturally”. This allowed many non-native and invasive species to flourish because their competition had been removed. A more proactive management philosophy is now being developed for these areas and individual landowners are encouraged to follow this lead. Much of the land that contributes to the natural feel of The Territory is in fact in private lots. As more homes are built, this land is naturally reduced so what is left needs to be managed to preserve what brought most of us here in the first place. The GTA is in the process of hiring a full time person to expand what has been started. **More comprehensive plans need to be developed to insure the natural environment of The Territory can be maintained.**

**Law Enforcement.** As in any community, local law enforcement is an important service. Fortunately, serious crime is not a significant issue at this time although minor crimes involving property and vehicles exceeding local speed limits are becoming an increasing concern. Law enforcement in The Territory falls under the jurisdiction of the JoDaviess County Sheriff’s Office. However, with limited financial and manpower resources, the Sheriff’s Office is not in a position to provide regular police patrol of The Territory’s +60 miles of road way, but does provide periodic patrol and does respond to law enforcement situations when called by GTA security personnel or other individuals. **The GTA needs to continually evaluate its law enforcement needs, needs to maintain an ongoing liaison with the Sheriff’s Office, and needs to explore options for improving and enhancing law enforcement services in The Territory.**

**Fire Protection.** With the value of property in The Territory approaching \$500 million, fire protection is a critical service. Currently, fire protection is provided by three (3) rural volunteer fire districts, including a volunteer manned sub-station in The Territory. The volunteers manning the sub-station in The Territory are primarily Territory residents many of whom are reaching the age when they will be “retiring” from the active fire service. **The GTA needs to continually evaluate its fire protection needs, to maintain ongoing liaison with fire protection providers, to promote volunteer fire service with its members, and to explore options for improving and enhancing fire protection services in The Territory.**

**Emergency Medical Services.** The population of The Territory consists of permanent residents estimated at over 1,000 people and week-end residents estimated at 4,000 to 5,000 people on any number of weekends throughout the Spring, Summer, and Fall. Emergency medical services are currently provided by a volunteer organization operating out of a facility in Galena adjacent to the Galena-Stauss Healthcare Center and supplemented by a number of EMT volunteers who are residents of The Territory and who respond to medical emergencies when available. **The GTA needs to continually evaluate its emergency medical needs, needs to maintain ongoing liaison with emergency medical providers, and needs to explore options for improving and enhancing emergency medical services in The Territory.**

**Water System.** The central water system is critical to the use and enjoyment of all current and future homes in The Territory who have access to the system (some lots in the Shenandoah area are not served by the water system). The water system consists of wells and mains ranging in age from 15 to 30 years. Some updating of the system has been made by the owner, Utilities, Inc., especially updating related to the wells where at least two (2) have been replaced in the past year. Two major concerns relative to the water system are: the overall age of the system, its level of care and maintenance by the owner, and its continuing ability to provide high quality service to home owners; and the capacity of the system to serve a community that has grown in ways that the original designers of the system may not have anticipated. The GTA needs to maintain an ongoing dialog with Utilities, Inc. to understand how the water system is being maintained and to be assured that the owner is adequately updating the system as the aging process impacts on the ability of the system to provide high quality water supply and service. **The GTA needs also to consider the merits of purchasing the water system and be prepared to work with Utilities, Inc. in that regard if and when it is determined that it would be mutually beneficial.**

**Sewerage System.** Like the central water system, the sewerage system is critical to the use and enjoyment of many current and future homes in The Territory who utilize the system for sewage disposal. The sewerage system consists of a sewage treatment plant off Thunder Bay Road, pumping stations and sewer lines ranging in age from 15 to 30 years. Some updating of the system has been made by the owner, Utilities, Inc., especially with the expansion of the treatment plant several years ago. Again as with the water system, there are two major concerns relative to the sewerage system: the overall age of the system, its level care and maintenance by the owner, and its continuing ability to provide adequate service to those home owners that connect to it; and the capacity of the system to serve a community that has grown in ways that the original designers of the system may not have anticipated. The GTA needs to maintain an ongoing dialog with Utilities, Inc. to understand how the sewerage system is being maintained and to be assured that the owner is adequately updating the system as the aging process impacts on the ability of the system to provide adequate service. **The GTA needs also to consider the merits of purchasing the sewerage system and be prepared to work with Utilities, Inc. in that regard if and when it is determined that it would be mutually beneficial.**

**Solid Waste Disposal.** Solid waste disposal is a growing concern for The Territory. As the number of permanent and part-time home owners increases the volume of solid waste will only increase. There are several components to solid waste disposal: refuse/trash disposal, recycling, and yard waste disposal. All are important components of the solid waste disposal process. Increased emphasis needs to be placed on recycling and adherence to recycling procedures; and a yard waste disposal program needs to be developed to address this growing problem and keep

yard waste out of the refuse/trash disposal facilities. Additionally, although hazardous waste disposal is separate from the solid waste disposal problem, it is an increasing concern because of the variety of materials and products that are considered hazardous waste when disposed of and because they are frequently improperly disposed of in the refuse/trash disposal facilities. **The GTA has spent considerable time and resources on developing solid waste disposal facilities and will need to continue planning for this important community need as well as devoting resources to the growing problem of yard waste and hazardous waste disposal.**

**Communications.** Communications, especially cellular telephone and high speed internet access, are an increasingly important service in any community. Both of these types of services have been problematic in The Territory. Although these services have been improving, much more needs to be done to reach the quality of service that most Territory home owners desire. Cable television, although traditionally associated with entertainment, is also a provider of telephone and high speed internet access. Cable television service in The Territory is currently limited, but should be expanded wherever feasible to serve more residents of The Territory and provide an additional alternative for telephone and high speed internet service. **The GTA needs to establish a closer relationship with the major providers of cellular telephone, high speed internet access, and cable television services; encourage such providers to improve these services in The Territory; and when ever feasible facilitate the process of improving of such services.**

**Vincent Farm.** The 212 acre Vincent Farm was purchased in 1996 by the Galena Trading Corporation (GTC), a for-profit corporation wholly owned by the GTA, in order protect a western edge of The Territory from undesirable development. From the original 212 acres, 27 acres was subdivided for single family homes and merged into the GTA. The subdivision consists of the homes and lots on Hillside Lane, a cul-de-sac roadway off of Vista Ridge. Of the remaining 185 acres 110 are in the federal governments Conservation Reserve Program (CRP), an agricultural conservation program for highly erode-able land, from which the GTC generates revenue from the United States Department of Agriculture. There is a small tree farm on the site as well as the original farmstead buildings and house. The house is currently rented and provides a source of revenue for the GTC. The property's location on existing U.S. 20 and near a future interchange of the U.S. 20 freeway with Devils Ladder Road and existing U.S. 20 greatly enhance the value of the property. Future plans for the remaining 185 acres are under discussion with a range of development ideas including housing, recreation, and continued agricultural production. **The GTC needs to continue to explore its options for the Vincent Farm property to determine the best use of this valuable asset for the benefit of The Territory.**

**Community Involvement & Volunteerism.** The Galena Territory is highly dependent upon outside local governmental and non-governmental entities for a variety the services. Although The Territory is a "community" of more than 1,000 permanent residents and often experiences population of more than 5,000 on summer and fall weekends, it is still viewed as a rural area and has little control over the level and quality of services received. One way to influence the level and quality of services received and to concurrently be good public citizens is for Territory residents to get involved in the various organizations within the county that impact upon our quality of life. **The GTA needs to support Territory residents who currently are involved with non-governmental service organizations and encourage more to get involved; and it needs to actively support the election or appointment of Territory residents to local governmental bodies that provide services to the Territory and/or who utilize the financial**

## **resources provided by Territory properties.**

Local governmental bodies on which Territory residents should have representation include: the Jo Daviess County Board; the Jo Daviess County Planning Commission, Board of Health, and Convention and Visitors Bureau; the Guilford and East Galena Township Boards, currently the Guilford Township Supervisor and three (3) of the four (4) Guilford Township Trustees are Territory residents.); the Scales Mound and Elizabeth Fire Protection Districts Boards (currently a number of Territory residents are volunteer firefighters with the Scales Mound Fire Protection District, but no Territory resident is a member of the Board of Trustees); the Galena Public Library District Board of Trustees; and the Galena, River Ridge, and Scales Mound School Districts Boards.

Territory residents are active and involved in a number of service organizations such as: the Jo Daviess Workshop, Inc.; Riverview Center, Inc.; Habitat for Humanity; the Galena/Jo Daviess County Historical Society and Museum, Friends of the Galena Library, Jo Daviess Conservation Foundation as well as various environmental groups; Rotary; and many other local service organizations. Additionally, Territory residents serve on the Galena-Stauss Hospital and Healthcare Center Board of Directors.

To further increase the Territory “voice” and have more impact on the level and quality of services received, more residents and property owners need to get involved. The “register one” voter registration process has had some success in getting part-time resident property owners to register to vote in local elections, but more registrations are needed to give greater “voice” to The Territory in matters of important concern to its residents and property owners.

**Revenue. New ideas for revenue generation for the GTA need to be examined as alternatives to simply increasing annual property assessments.** An open forum for property owners earlier in 2006 generated more than 50 such ideas. Some of them are being acted upon, and some need more study and review before any action is taken. The majority of the suggestions centered on user fees for the various amenities provided by the GTA.

**Eagle Ridge Resort and Spa.** Eagle Ridge Resort and Spa is an important element within The Galena Territory. Its original mission as an adjunct sales tool for lots in The Territory has evolved into a substantial resort/conference center with a strong golf component. The Resort and Spa benefits from its location within The Territory: by being able to include many Territory homes and condominiums in its rental program thereby accommodating many more resort/conference guests than it might otherwise be able to in its limited hotel facilities; by being able to utilize Lake Galena and other Territory facilities for its resort guests; and by having an established community of residents and property owners available to utilize the Resort and Spa facilities. The Territory benefits from having the Resort and Spa in the Territory because of its attraction of thousands of resort/conference guests to The Territory who become familiar with homes in The Territory and often become future residents and property owners; and because it provides facilities and activities that meet the needs of some residents and property owners. **The GTA needs to establish and maintain a positive understanding with the ownership of the Eagle Ridge Resort and Spa to promote and enhance a mutually beneficial relationship.**

**U.S. 20 Freeway.** The planning process for the development of a four-lane freeway replacement for the existing U.S. 20 through Jo Daviess County from Freeport to and around Galena has been

completed and a right-of-way alignment has been established by the Illinois Department of Transportation. The selected alignment follows the “Longhollow” option which takes it within a mile of the southeasterly boundaries of The Territory. Although there is considerable concern about the “Longhollow” alignment among many Territory residents and property owners, at this stage in the planning it appears as though the alignment is firmly established. It also appears that because of the high cost of the proposed U.S. 20 freeway and other State of Illinois highway needs that the actual construction of the freeway will be many years in the future. **It is important, however, for the GTA to be vigilant regarding this matter and establish a liaison with the Illinois Department of Transportation that will allow The Territory, at the appropriate time, to participate in the design and construction planning of the freeway to minimize and mitigate any adverse impacts the freeway may have on The Territory.**

**External Physical/Geographic Environment.** As a unincorporated community, The Territory has no control over and little influence on development that has gone on around it or that will be proposed in the future. It is likely that as The Territory continues to grow in permanent and part-time population and as available lots are built upon, it will create the environment for additional peripheral development which may or may not be consistent with the desires of Territory property owners. **The GTA needs to establish a relationship with the County that will maximize its influence on future development that will occur in the area surrounding The Territory.**

**Declaration of Covenants and Restrictions.** The Declaration of Covenants and Restrictions was established 1973 by the Branigar Organization in the original planning/development process for The Territory. The purpose of this declaration was to protect the planned community development by enforcing certain covenants, restrictions, easements, charges and liens. This Declaration encompasses existing properties; additions thereto; the architectural review process; general restrictions involving land use, structures, lots; common properties; membership; assessments; and infrastructure. When the Covenants were adopted, they provided that they would be in effect with no opportunity for change for 20 years (1993). After that period, they can be amended every ten years (1993, 2003, 2013, etc.) by a two-thirds vote of all of the property owners. Since this does require that all property owners vote, this could be a long process. **Because the Declarations are now 33 years old and will be 40 years old when they can next be updated and because the amendment process takes such a long time, it is important that the Declarations of Covenants and Restrictions be reviewed and recommendations for amendment, if desired, be made by 2010.**

**Incorporation.** The Galena Territory is a “community” in all respects. It currently has a full-time resident population estimated to be 1,058, swelling to +/-5,000 people on many weekends throughout the year. If new home construction continues at an average rate of 50 or 60 per year as it has in the recent past, within 10 years the full-time population could reach 1,400 increasing to +/-6,000 on many weekends. The Territory already has the largest land area, the largest number of housing units, the most miles of public roads, and the highest assessed valuation of any County community, including the City of Galena. Nevertheless, as an unincorporated community, The Territory is reliant upon the County and other entities for most of its public services with little or no influence on the level or quality of these services.

Its size and the number of significant “opportunities, challenges, and concerns” facing The Territory identified above, and more may be identified in the future, all suggest that the

possibility of incorporation as a municipality needs to be evaluated and considered. There are several potential benefits of incorporation. Among these are:

1. Receipt of revenues from the State of Illinois, such as a share of state income, motor fuel use, and retail and services sales taxes, which are not available to the GTA as a not-for-profit corporation but are available to municipality. The County currently receives these.
2. The opportunity to shift some existing GTA services now covered by assessments to a municipality where their cost would be tax deductible to property owners.
3. The ability to control development within a one and one-half mile radius of The Territory through a municipal land use plan.
4. The ability to establish laws and regulations relating to security and public safety and enforce these laws with a municipal police department.
5. The ability to adopt codes and regulations relating to building, zoning, and health with enforcement mechanisms.
6. The ability to license, franchise, and tax businesses providing services to and within The Territory.
7. Qualification for federal and state grants available only to governmental entities. Accessibility to tax-exempt financing for public improvements.
8. The potential for municipal home rule and its resultant ability to address local problems, issues, and concerns with local solutions and not be limited by the state wide solutions contained in state statutes.

**For these various reasons, over the next few years the GTA needs to consider and evaluate the possibility of incorporating The Territory as a municipality.**

## **Chapter 4**

### **Mission, Goals, & Objectives**

In January 2006, the GTA Board of Directors adopted the following Mission Statement and Goals for The Galena Territory. The Goals are long-term, qualitative statements of desirable conditions to create and maintain.

Implementation of the Goals set forth below involves the establishment of various Objectives. Objectives are more specific steps, projects, programs, or actions, which can be scheduled, budgeted and accomplished as a means of trying to achieve the long term goals. The objectives should be re-evaluated periodically to reflect changed conditions, both external and internal, in terms of member interest and needs, and available resources. The mission statement and goals are the basis for evaluating specific objectives and a basis for evaluating alternatives.

#### **Mission Statement**

The mission of the Galena Territory Association is to continue to foster development and use of the area within the Galena Territory through the wise allocation of resources to maintain and add value to member properties by providing services, infrastructure, and management of amenities, consistent with property owner interests and protection of the natural environment and character of this recreational, residential, and resort community.

#### **Goals**

- A. To protect, preserve, and enhance the natural environment, character and resources within The Galena Territory.
- B. To provide quality and diversified recreational opportunities and leisure activities within The Galena Territory for all ages.
- C. To identify and support the provision of essential community services that maintain and enhance the quality of life within The Galena Territory.
- D. To identify and recommend new or expanded physical facilities necessary to implement the goals of this Plan; and create and recommend a prioritized multi-year financial and operational plan for such physical facilities.
- E. To consider the merits and process of expanding the physical limits of The Galena Territory should such opportunities present themselves.
- F. To develop, establish, and maintain an effective means of communications and cooperation with Eagle Ridge Resort and Spa, to be aware of the long range plans of the Eagle Ridge Resort and Spa, and to explore opportunities for sharing use or construction of amenities.
- G. To support the development and maintenance of GTA staff capability necessary for the effective and efficient implementation and achievement of the goals and objectives of the GTA.

- H. To encourage the creation by the GTA Board of an organization and committee structure that can: effectively support the implementation of the goals and objectives of this Plan; and promote effective communications between the Board and committees and between committees.
- I. To develop, establish, and maintain on going communications with governmental and non-governmental organizations that provide services to The Galena Territory or use the tax and other resources of The Territory.

## **Objectives: Projects & Programs**

The long-range planning process has identified numerous objectives in the form of projects and programs worthy of inclusion in the Long-Range Plan. Following is a summary listing of all of the projects and programs included in the Plan presented in order of the goals that they are intended to implement. For each project or program in this summary listing there is a more detailed Project Analysis Sheet in the Appendix which notes: the specific objectives to which the planned actions relate; the budget line item for the actions summarized in Chapter 5; jurisdictional coordination required or desired; capital, administrative and maintenance implication; anticipated implementation schedule and requirements; and, possible funding sources. The number in parenthesis following each project and program title in the listing below refers to the data sheet number. Many projects impact multiple goals, projects are listed under the goal most impacted, project numbers are also listed under goals that are also impacted.

- A. Goal: To protect preserve and enhance the natural environment, character and resources within the Galena Territory.
  - 1. Natural Areas Manager (100)  
Hire a Greenspace/Lake manager.
  - 2. Landscaping at Owners Club (200)  
Add beauty to the site, correct erosion and water runoff and reduce maintenance costs where possible.
  - 3. New trail on Wachter (300)  
Create new trail between the East Course and Territory Drive
  - 4. Wetland Engineering (400)  
Improve the health of Lake Galena and to reduce the frequency and costs of dredging.
  - 5. 319 Grant – Small Pox Creek (500)  
This is the third phase of the Lake Galena erosion control project.
  - 6. Trail system Expansion (600)  
Continuation of the existing trails work that should provide opportunities to reopen trails and/or expand the existing trail system.

7. Establish Prescribed Burn Team (700)  
Develop a burn team of Territory personnel to do burns on GTA property as well as private property within the Territory.
8. 319 Grant – Small Pox Creek (500)  
This is the final phase of the Lake Galena erosion control project.
9. New Signage (800)  
Replace directional signs within the Galena Territory.
10. Wetland Restoration (900)  
Develop wetlands to decrease silt in the Lake

Additional projects that impact this Goal are:

1000                      1600    2900    3000

B. Goal: To provide quality and diversified recreational opportunities and leisure activities within the Galena Territory

1. Fishing Dock (1000)  
Build fishing dock with walkway at the Marina
2. Playground at Owners Club (1100)  
Plan for a playground in conjunction with the new pool.
3. Marina Tennis Courts (1200)  
Expand tennis courts at the Marina
4. Improve Fish House at Marina (1300)  
Purchase new grinder for fish house.
5. Expansion of Thunder Bay Falls Park (1400)  
Develop plan to include recreation areas in park area

Additional projects that impact this Goal are:

100    200    500                      600    800    900            1700    2000    2100    2300  
2400    2700

C. Goal: Identify and support the provision of essential community services that maintain and enhance the quality of life within the Galena Territory

Projects that impact this Goal are:

100    200                      600    800                      900    1000                      1100  
1200                      1300    1700    2000    2100    2200    2300    2900    3000    2400    2700

D. Goal: To identify and recommend new or expanded physical facilities necessary to implement the goals of this plan

1. New Parking at the Owners Club (1500)  
Expand parking by the tennis courts.
2. Install Drainage System at Owners Club (1600)  
Install new curbs and gutters or natural plantings to control run off
3. Construct New Maintenance Building (1700)  
Build a new facility to house equipment and inventory.
4. New Chairs for Social Hall (1800)  
Purchase 300 new stack chairs.
5. Improvements to Kitchen in Social Hall (1900)  
Modify caterers' kitchen to improve efficiency.
6. Develop Plans for New Pool (2000)  
Develop conceptual plans for new pool/recreation complex
7. New Roof at SRC (2100)  
Install new roof over indoor arena, stalls and trail barn area.
8. New Fire Protection System Old Building (2200)  
Extend new building system to old building.
9. New Pool (2300)  
Build new pool and recreation complex

Additional projects that impact this Goal are:

100    500    800    1000            1100    1200            2600

E. Goal: To consider the merits and process of expanding the physical limits of The Galena Territory should such opportunities present themselves.

F. Goal: To develop, establish, and maintain an effective means of communications and cooperation with Eagle Ridge Resort and Spa, to be aware of the long range plans of the Eagle Ridge Resort and Spa, and to explore opportunities for sharing use or construction of amenities.

Projects that impact this Goal are:

100    500            600    800            1100    2000    2100    2300  
2400    2600

G. Goal: To support the development and maintenance of GTA staff capability necessary for the effective and efficient implementation and achievement of the goals and objectives of the GTA.

Projects that impact this Goal are:

100 1700 2000 2600 2700

- H. Goal: To encourage the creation by the GTA Board of an organization and committee structure that can: effectively support the implementation of the goals and objectives of this Plan; and promote effective communications between the Board and committees and between committees.

Projects that impact this Goal are:

100 200 800 900 1000 1100 2100 2200  
2600 2700

- I. Goal: To develop, establish, and maintain on going communications with governmental and non-governmental organizations that provide services to The Galena Territory or use the tax and other resources of The Territory.

Projects that impact this Goal are:

100 200 500 900 2100 2200  
2600 2700

**Chapter 5**  
**Implementation**

The Long-Range Capital Plan represents a summarization of high priority capital projects and programs intended for GTA Board consideration for implementation during the next five (5) years (the first year is included in the 2007 Annual Budget). It should be emphasized that the identified projects and programs, their estimated cost, and their allocation over the next five (5) years or beyond are all subject to review by the GTA Board during the annual budgeting process. The changing needs of the GTA as The Territory grows and changes and financial considerations may result in new projects or programs being added, some of those presented in this Plan eliminated, the estimated costs being adjusted, and yearly allocations being modified.

GALENA TERRITORY ASSOCIATION  
LONG-RANGE CAPITAL PLAN  
FY 2007-2012

FY 2007      FY 2008      FY2009      FY 2010      FY 2011      FY 2012+

LISTED BY THE GOALS OF THE GTA LONG RANGE PLAN

A. To protect, preserve and enhance the natural environment character and resources within the Galena Territory

Natural Areas Manager(100)	\$ 50,000					
Landscaping at Owners Club (200)	\$ 3,000	\$ 8,000				TBD
New Trail on Wachter(300)*	\$ 18,000					
Wetland Engineering (400)		\$ 20,000				
319 Grant - Sm. Pox Crk(\$100,000)(500)		\$ 40,000				
Trail Expansion (600)		\$ 10,000	\$ 10,000			
Establish Burn Team (700)			\$ 1,500			
319 Grant - Sm. Pox Crk(\$102,000)(500)			\$ 40,800			
New Signage (800)				\$ 30,000		
Wetland Restoration (900)						TBD

B. To provide quality and diversified recreational opportunities and leisure activities within the Galena Territory

Fishing Dock(1000)*	\$ 35,000					
Playground at Owners Club (1100)						TBD
Marina Tennis Courts (1200)			\$ 45,000			
Improve Fish House at Marina (1300)		\$ 8,000		\$ 7,000		
Expansion of Thunder Bay Falls Park (1400)						TBD

C. To identify and recommend new or expanded physical facilities necessary to implement the goals of this plan

New Parking at Owners Club(1500)						TBD
Install Drainage System at Owners Club (1600)	\$ 20,000					
Construct New Maintenance Building (1700)						TBD
New Chairs for Social Hall (1800)	\$ 25,000					
Improvements to Kitchen in Social Hall (1900)	\$ 10,000					
Develop Plans for New Pool (2000)	\$ 23,000					
New Roof at SRC (2100)			\$ 200,000			
New Fire Protection System Old Building (2200)	\$ 72,000					
New Pool/Recreation Complex (2300)						TBD

TOTAL	\$ 106,000	\$ 236,000	\$ 252,300	\$ 82,000	\$ -	\$ -
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\* funding on hold until midyear assessment of cash flow

## **Chapter 5**

### **Implementation**

In addition to projects and programs in the foregoing Long-Range Capital Plan, a number of items considered during the long-range planning process were included in the FY2007 Operating Budget and do not appear on the Plan or were forwarded to appropriate committees and/or management for further consideration. These items are as follows:

#### **FY2007 Operating Budget Items:**

1. Refurbishing of Thunder Bay Falls Park - \$1,000
2. Pond Court restoration - \$8,000 (Funded from reserves.) (2600)
3. 319 Grant work on Plum Cove and golf course - \$69,000 (Funded from resvs.) (500)
4. Weed Harvester renovation - \$12,500 (2400)
5. Asphalt overlay on parking lot behind firehouse - \$11,000
6. Greenspace equipment - \$1,000
7. Automatic External Defibrillator (AEDs) - \$3,800 (Unfunded) (2500)

#### **Forwarded to committees and/or management for further consideration:**

Forwarded to Greenspace Committee:

1. Upgrade trail system for cross country skiing
2. Provide guided nature walks and photography sessions
3. Kid friendly trail
4. Connect some of the trails

Forwarded to Management:

1. Softball/baseball field
2. Provide bike rental
3. Dog park
4. Frisbee golf
5. Use the lounge as a "members bar & grill"
6. Hamburger/hot dog stand at the marina
7. Develop storage units at the quarry
8. Develop of woodland management program (2700)
9. Develop a weed management program (2800)
10. Parking at SRC (2900)
11. Move boat ramp to North Cove (3000)
12. Composting Facility (3100)

Also during the long-range planning process, the following revenue ideas were identified and have been forwarded to management for their consideration and possible presentation to the Board.

1. Charge non-owners for use of the pool
2. Charge an impact fee for rental home owners
3. Charge fees for multiple ownership of lots
4. Charge an asset preservation fee
5. Raise member services fees
6. Provide a business center at the Owner's Club
7. Market business services in the Owner's Club

8. Simplify and streamline facility rental process
9. Raffle off a lot when one becomes available
10. Develop a committee to study fee and assessment structures in similar planned communities

## Appendix

<u>Projects</u>	<u>Project Analysis Sheet Number</u>
Greenspace/Lake Galena Manager	100
Owner's Club Landscaping	200
Move Trails off Major Roadways	300
Wetland Creation	400
319 Grant Activities	500
Trail System Expansion	600
Develop Territory Burn Team	700
Replace Galena Territory Direction Signs	800
Wetland Restoration	900
Fishing Dock	1000
Playground at the Owners Club	1100
Expand Tennis Courts at Marina	1200
Fish Cleaning Station	1300
Thunderbay Falls Park	1400
Parking Lot at the Owners Club	1500
Drainage System	1600
New Maintenance Facility	1700
Social Hall Chairs	1800
Social Hall Kitchen Improvements	1900
Conceptual Plans for New Recreation/Pool Complex	2000
SRC Roof	2100
Extend Fire Protection in Old portion of Owners Club	2200
New Pool/Recreation Area	2300
Aquatic Plant Control	2400
New AED's for the Marina and Owners Club	2500
Pond Court Restoration	2600
Woodland Management Plan	2700
Weed Management Plan	2800
Parking at SRC	2900
Move Boat Ramp to North Cove	3000
Composting Facility	3100