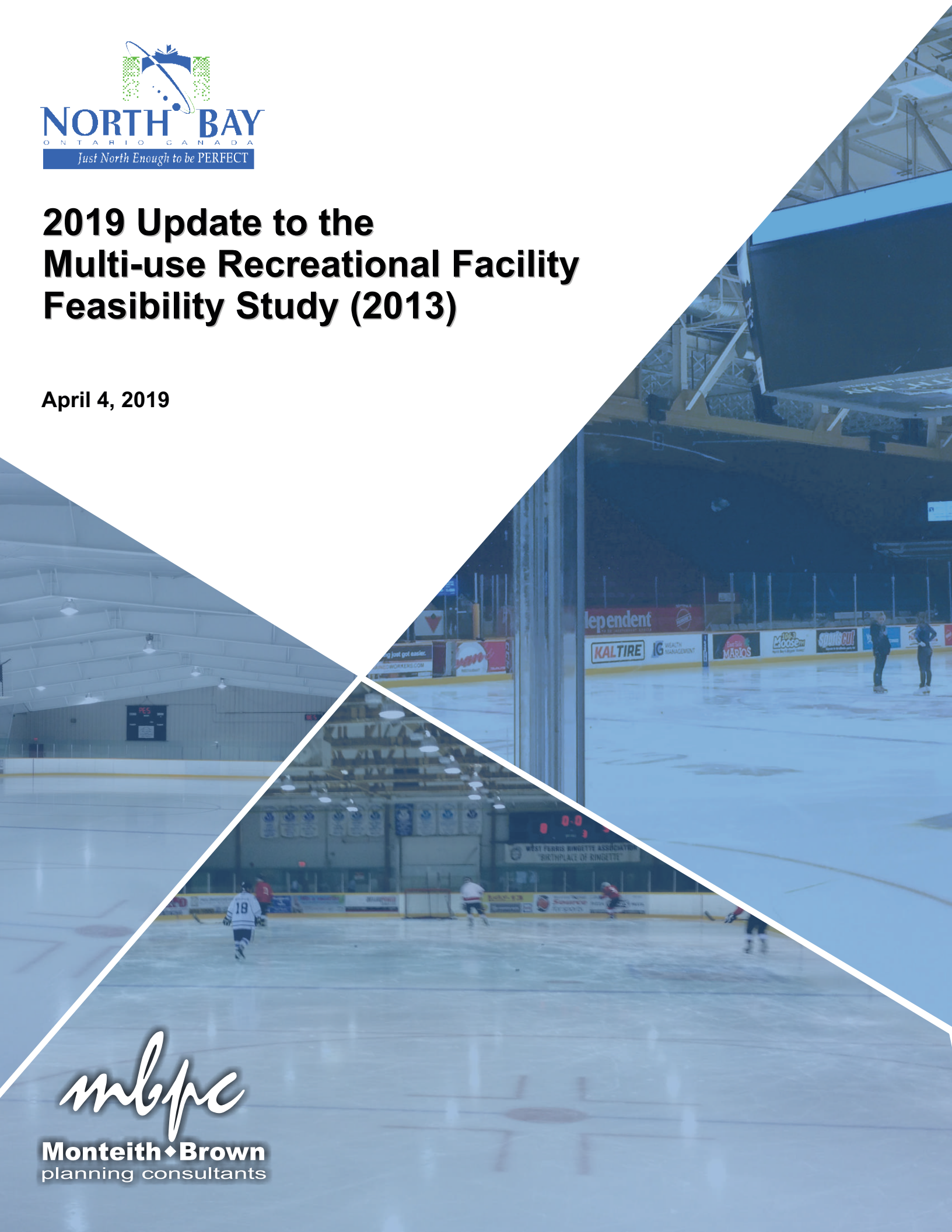


2019 Update to the Multi-use Recreational Facility Feasibility Study (2013)

April 4, 2019



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planning consultants



City of North Bay

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Multi-use Recreational Facility
Feasibility Study (2013)**

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Prepared by:



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LIMITATIONS

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Summary of Findings: 2019 Update to the Multi-use Recreational Facility Feasibility Study

A. About this Update

In 2013, the City of North Bay completed a Multi-use Recreation Facility (MURF) Feasibility Study to identify needs, options and costs associated with the development of new indoor recreation infrastructure, including arenas. Since this time, several factors have emerged that warrant revisiting the analysis of ice needs in North Bay, such as new and emerging demands, changing demographics, and the renewal of Memorial Gardens Arena. Most notable is the need to address the end of life of West Ferris Arena.

This Update to the 2013 MURF Study was completed to inform the City of North Bay's arena provision strategy, including confirmation of current and future demand for indoor ice arenas. The study considers updated population and participation/usage data, trends and allocation practices, and stakeholder consultation completed in March 2019.

This assessment provides City Council and community with the confidence necessary to advance arena facility planning to the next stage, which should include a decision on the location for a new arena. While this report does not involve the evaluation of specific sites, it is intended to assist the City in this analysis.

B. Factors Influencing Demand

Current and arena facility needs are influenced by several internal and external factors, including:

- Existing Arenas;
- Demographics;
- Participation Trends; and
- Stakeholder Input.

Existing Arenas

- Since the 2013 MURF Study was completed, the City's arena facilities – all of which are now 45 years or older – have aged another six years. Their age and shortcomings are increasingly apparent (except for the renewal of Memorial Gardens Arena in 2013/14).
- Nevertheless, North Bay's arenas are very well used, with a system-wide usage rate of 94% during prime time hours. This rate is indicative of a system that is operating at capacity.
- The City has experienced pressures for ice time from new user groups since the 2013 MURF Study. Prime time ice usage for competitive and youth groups has increased by 8 hours per week, which has impacted other users, particularly adult groups and Nipissing University and Canadore College intramural players.

Demographics

- Updated population projections suggest that North Bay's population will increase 5% between 2016 and 2046.
- Like the rest of Canada, North Bay's population is aging. The senior age cohort (70 years and over) is expected to drive the majority of the City's population growth.
- Increases in youth ice sport registration are possible as the 5 to 19 age group is projected to grow by 4.5% by 2036.

Participation Trends

- The growth of competitive hockey in North Bay has been influenced by the arrival of the OHL team and the maturation of the respective leagues. New teams have been established (e.g., Varsity women's team, girls hockey, etc.) and competitive leagues have expanded and become stronger.
- Increased exposure and sport opportunities has led to greater demand for ice time, such as more practices in prime time. Growth in competitive hockey has had a trickle-down effect for other users, some of which now receive fewer and/or less desirable times.
- Standards of play are also changing, leading to greater ice requirements and a need for regulation-size ice surfaces (200' x 85'). Memorial Gardens Arena is the City's only NHL-size ice pad.
- In 2018/19, there were 2,947 total registered participants using North Bay arenas (1,839 of which are youth). Although the number of participants has declined by 5% since the 2013 MURF Study, ice utilization and requests remain strong.

Stakeholder Input

- Stakeholders were unanimous in their support for increasing the supply of ice within North Bay. All groups cited a lack of available/sufficient ice time, combined with undersized ice pads, as having a negative effect on their programs. In response, some groups cannot meet their standards of play and have created wait lists.
- More than 115 additional prime time hours per week were requested from stakeholders to provide new programs, practices and games. This also includes approximately 41 hours of ice time per week that is currently rented outside of North Bay.
- There is a strong desire for modern, quality arenas that offer multiple regulation-size ice pads. This levels the playing field for all user groups, creates additional capacity, and allows leagues and teams to maximize the potential of their participants.
- Groups felt that arena investment will also bolster the City's ability to attract sport tourism opportunities and host tournaments. They also noted demand for other recreational uses that appeal to residents of all ages (e.g., walking/running track).

C. Statement of Need

North Bay has sufficient and sustained demand to support a fifth indoor ice pad, now and into the foreseeable future.

Based upon the current usage profile, recommended provision target (one ice pad per 425 youth participants) and estimated participation, **there is currently a need for 4.8 ice pads (a deficit of 0.8 rinks)**. Therefore, the City should consider building two (2) new ice pads and decommission West Ferris Arena.

This finding is based on the updated data collection and analysis, which is consistent with stakeholder input received that indicates a degree of pent-up demand. This level of demand is forecasted to increase slightly to 5.0 ice pads by 2036 due to modest growth in the child/youth population.

The demand for an additional ice pad is most strongly correlated with:

- a) increased ice time requirements for competitive organizations and higher levels of play;
- b) new programs, skill development, and sport tourism and tournament opportunities; and
- c) a strong desire for groups to rent increased ice time locally, instead of outside the City.

Due to the forecasted commitments made by stakeholders, the analysis suggests that prime time usage in peak season across all five arenas should remain in the 90% to 95% range for the foreseeable future. It is possible that non-prime time usage will decline as user groups seek to secure better ice time made available by an additional ice pad; however, this also creates opportunity to allocate more non-prime hours (particularly shoulder hours) to new users or existing groups seeking to rent ice time in the City.

D. Facility Location, Design and Budget Considerations

There is considerable evidence to suggest that the location and size/design of recreation facilities impacts service, convenience and performance. The decisions regarding location and design are as important as the decision to develop a facility. By way of a special project committee, the previous City Council undertook a site location search for a new arena facility.

As a starting point, the ideal site should have sufficient space for a **multi-pad arena** (stand-alone single pad arenas were not supported in the 2013 MURF Study or this 2019 Update) with regulation-size ice pads and associated parking. The site should be connected to (or capable of being connected to) municipal services, with relatively flat grades. Larger sites are preferred over smaller sites so that in future years, additional construction (such as the replacement of the aging Pete Palangio rinks and/or other recreational uses) could be phased in to expand the complex to support future growth.

The following **locational criteria** are commonly used to guide site selection exercises for major recreation facilities and may be useful in informing the City's decision-making. The City may choose to identify mandatory criteria and/or apply weights to various criteria to denote their importance.

- a) Proximity to Population
- b) Accessibility by Road (major street)
- c) Accessibility by Transit and Active Transportation Routes
- d) Site Suitability (size and shape) and Visibility
- e) Site Development Costs
- f) Compatibility with Surrounding Uses
- g) Ownership
- h) Zoning and Development Approvals
- i) Opportunity Cost and Operational Efficiency
- j) Distance from Comparable Facilities
- k) Potential for Expansion
- l) Ability to Generate Synergies with Other Indoor and Outdoor Amenities, including Sport Tourism

Beyond specific site characteristics, there are several **qualitative considerations** that may contribute to the success of one location over another. The importance of the following considerations will depend on the objectives established for the facility, as well as the proposed facility components, uses and markets.

- The site should enhance accessibility for those in need and strengthen the community.
- The site should support strategic investment opportunities and offer valued-added benefits (e.g., facility expansion potential, community pride, conference and trade show potential, etc.).
- The site should have user group and wide community support.

As the City plans to invest in arena and recreational infrastructure, it is important to develop a strategic approach that is aligned with community priorities. As supported by the guiding principles, one of the objectives should be to design facilities that provide appealing spaces, features and amenities and that respond to a broad range of activities. Typically, multi-pad arenas and multi-purpose facilities are better able to meet community and individual needs and the City's overall objectives single-pad arenas and single-use facilities.

E. Moving Forward

The following simplified steps, presented generally in sequential order, are offered for the City's consideration in moving this project forward.

1. Provision Decision

- If the City concurs with the findings of this study – that there is sufficient demand for a fifth ice pad – it will look to build a twin pad arena to address immediate needs. This approach should be confirmed by the City.

2. Site Selection & Preliminary Planning

- The City should closely examine potential sites in terms of their feasibility for accommodating the proposed facility. The location criteria identified in this report may be used as a starting point. Following site selection, the preliminary concept plans and cost estimates should be updated to reflect the chosen location.

3. Detailed Financial Plan

- A financial plan for capital construction should be prepared for the selected site, with consideration of fundraising, infrastructure funding by senior levels of government and partnerships, in addition to municipal contributions. Putting this plan into action in a short time will require strong support from Council, including the allocation of sufficient capital funding.
- **Note:** City Council recently budgeted an upset limit of \$30 million dollars in the 2019 Capital Budget towards the construction of a new twin pad. The City estimates that the cost to operate a twin pad arena (excluding principal and interest) will be similar to the cost to operate West Ferris Arena due to operating efficiencies associated with multi-pad arenas.

4. Design & Construction

- Staff are recommending a traditional Design-Bid-Build approach.

5. Completion

- Ideally, the opening of the new twin pad arena will coincide with the closure of West Ferris Arena. Should this not be feasible, the City should work with user groups and organizations to identify contingency plans.

Section 1: Introduction

1.1 Study Purpose

To inform its arena provision/renewal strategy, the City of North Bay is seeking to **confirm current and future demand for indoor ice arenas**. This exercise was last completed through the 2013 Multi-use Recreation Facility (MURF) Feasibility Study (“2013 MURF Study”). This report seeks to build on past studies by incorporating current data and analysis into the evidence-based needs assessment model.

The demand analysis relies heavily on updated data provided by the City (schedules, registration figures, population projections, etc.) and stakeholder consultation, as well as trends and allocation practices in other communities. This assessment provides City Council and community with the confidence necessary to advance arena facility planning to the next stage, which may include updated financial planning (e.g., funding strategy, business case) and design or technical analysis (e.g., concept plans, site evaluation).

1.2 Methodology and Scope

The City’s Multi-use Recreational Facility Advisory Committee has remained intact and active since the 2013 Study was prepared. This Committee – consisting of City staff and representatives from Partners in Hockey (ice users), Sport North Bay, post-secondary institutions (Nipissing University / Canadore College) and the community at large – was used as a resource for this Update. Monteith Brown Planning Consultants, primary authors of the 2013 MURF Study, were retained to prepare this report.

Preparation of this Update was divided into two parts:

Part 1 – Arena Needs (see Sections 2 and 3)

- updated arena participation and utilization data that may impact current and future needs
- review of community demographics and population forecasts
- stakeholder consultation through user group questionnaires, workshop and interviews
- identification of current and future arena needs

Part 2 – Strategy Development (see Sections 4 and 5)

- identification of best practices relating to facility provision to assist the City in its future decision-making
- potential next steps

The following items are beyond the scope of this Update, but could be considered as part of future phases if required:

- needs assessment of multi-use recreation components (e.g., indoor turf, gymnasium, track, etc.)
- site identification, evaluation and selection
- engineering analysis (e.g., existing buildings, geotechnical investigations, etc.)
- concept plan development
- business planning, such as user fee analysis, operating model/costs, capital costs, funding sources and sport tourism impact
- partnership options and negotiation

1.3 Summary of the 2013 MURF Study

The 2013 MURF Study was received by City Council on January 28, 2013. It identified that, while there was pressure for additional ice time, there was insufficient demand for a fifth ice pad in North Bay at the time. Further, the City's demographics and usage projections suggested steady to declining demand into the future. It was recommended that the City monitor participation levels, ice utilization, demographics, arena supplies in surrounding communities, and negotiations with contract rentals in order to undertake periodic reviews of ice requirements.

Based on the direction to maintain a supply of four ice pads, the following arena provision options were identified in the 2013 MURF Study:

- Option A1: Upgrade one or more existing arenas
- Option A2: Replace Pete Palangio Arena
- Option A3: Replace West Ferris Community Centre
- Option A4: Replace Pete Palangio Arena & West Ferris Community Centre

1.4 Changes since 2013

Several factors have emerged since the 2013 MURF Study was completed that highlight the urgency behind this review ice needs in North Bay.

Arena Renewal

The City pursued Option 1A from the 2013 MURF Study shortly after it was completed. Specifically, Memorial Gardens Arena underwent extensive renovations to update the arena as it became the home of North Bay's OHL Team, in addition to other contract and community rentals. Renovations included extending the ice pad to meet OHL regulations, adding spectator seating and ancillary areas, and more. This has allowed the City to host larger sports events at Memorial Gardens (most notably the 2018 World Women's Curling Championship); however, tournament-hosting capabilities continue to be limited due to the shortcomings at other arenas. The other facility provision options identified in the 2013 MURF Study were not implemented.

Aging Infrastructure

First and foremost, the City's four ice pads have aged another six years and are now that much closer to the end of their lifespan. While updates were undertaken at Memorial Gardens, the deterioration of infrastructure is particularly evident at West Ferris Arena (52 years old).

The need to replace West Ferris Arena is driven by the technical, future functional and financial challenges. First and foremost are the technical challenges of the aging facility identified in the Condition Assessment completed in 2016 (Condition Assessment of Building Structure for West Ferris Arena – WSP Canada 151-09144-00). At the time, the report identified that although the existing truss system, properly maintained, is capable of resisting the existing dead loads and applied snow loads typical for an arched roof in North Bay, the roof has exceeded its original design service life and is approaching the end of its life. Other components are also at the end of life and failing (e.g., unplanned closure for one week in early March 2019 to install a new chiller). It has been identified that the West Ferris Arena has reached the end of its life and needs to be replaced.

Since the 2013 MURF Study, the recent Building Conditions Assessment (2015) of the Pete Palangio Arena indicates that the facility can continue to operate for approximately another decade before starting to incur increasingly higher maintenance costs. It was heard through the update of the Study, that the Pete Palangio Arena presents numerous barrier free accessibility challenges and increasingly does not meet the functional needs of the community. Options for its replacement and/or repurposing should be considered at some point in the medium-term.

Although the 2013 MURF Study has yet to be fully implemented, the City has acknowledged these concerns and advanced this initiative by engaging other sectors in discussions surrounding a new arena complex. At this time, the City is not pursuing a third-party arena facility venture.

New and Emerging Demands

Pressures for ice time have continued to mount since the 2013 MURF Study was completed, due partially to the arrival of North Bay's OHL Team and new Nipissing University women's varsity team. Demands for additional ice time driven by the increasing requirements of other competitive groups such as the AAA Trappers and Girls' Hockey have been much more pronounced than the 2013 MURF Study anticipated. Changes to standards of play and skill development models instituted by Hockey Canada and the pursuit of new tournaments and events associated with the City's Sport Tourism Plan have also impacted ice needs.

Changing Demographics

North Bay's community demographics have continued to evolve. Between the past two census periods, the City's population declined and the median age rose. Looking to the future, City Council is committed to pursuing strategies that will seek to boost economic and community growth, and a new set of population forecasts are being developed. Within the context of arena needs, these considerations are more fully assessed within the subsequent sections of this report.

Section 2: Study Context

In identifying current and arena facility needs, research and assessment of the following inputs is required:

- existing arenas, including utilization rates, limitations and availability of rinks outside North Bay
- participation trends, including general recreation trends and sport registration levels and
- community profile, including the age of the population and population forecasts
- stakeholder input, including key challenges and requests for additional ice time




2.1 Existing Arenas

There are three municipal arena facilities in the City of North Bay (totalling four ice pads), as well as rinks in surrounding municipalities that are used by North Bay user groups. The geographic distribution of North Bay's arenas is illustrated in Figure 1 and a summary of the arena supply is contained in Table 1.

Figure 1: City of North Bay Municipal Arena Supply



Table 1: City of North Bay Arena Summary

Memorial Gardens Arena		<p>Signature Rink / Event Venue</p> <p>Built in 1955, renovated in 2013</p> <p>1 pad (200' x 85')</p> <p>Private boxes, spectator seating, 5 dressing rooms</p>
West Ferris Arena		<p>Community Arena</p> <p>Built in 1967</p> <p>1 pad (180' x 80')</p> <p>Limited spectator seating, 5 dressing rooms, community hub</p>
Pete Palangio Arena		<p>Community Arena</p> <p>Built in 1974 by the private sector</p> <p>2 pads (180' x 80') – Kelly and Demarco</p> <p>Limited spectator seating, warm viewing area, 12 dressing rooms</p>

Limitations of Existing Arenas

The City's arena stock is aging, increasingly antiquated, and generally in need of re-investment (aside from components that were renewed or developed as part of the 2013 expansion of Memorial Gardens Arena). Limitations identified by stakeholders include under-sized ice surfaces, a lack of accessibility, change rooms that are too few and too small, and a general need for modernization.

As previously indicated, structurally and mechanically, the West Ferris Arena is nearing the end of its life and is beyond the typical lifespan of an arena of its type. The Pete Palangio Arena, although well maintained, is not comparable to newer facilities in other communities and may eventually result in greater maintenance costs year after year. Both West Ferris and Pete Palangio Arenas will have limited and decreasing ability to attract sport tourism events and are seeing declining rates of user satisfaction.

Arena Usage Profile

Arena schedules were analyzed to understand usage of North Bay’s arenas. The schedules identify regular usage from minor organizations, contract users, adult leagues, post-secondary institutions and City programs, as well as tournaments and special events.

To support this analysis, City staff provided detailed ice bookings as well as a typical weekly ice schedule for the 2018/19 ice season. Ice usage levels identified in this section are based on arena schedules and not actuals. This focus on “planned usage” does not reflect turned back time or last minute ice pick-ups, which can change from week to week.

The following is a summary of key findings from the analysis of 2018/19 ice season schedules, followed by supporting data tables. For the purposes of this assessment, prime and non-prime time hours are defined as:

- Weekday prime time (Monday to Friday): 4 pm to 10 pm
- Weekend prime time (Saturday to Sunday): 7 am to 10 pm
- Weekday non-prime time (Monday to Friday): 7 am to 4 pm
- Weekend non-prime time (Saturday to Sunday): 10 pm to 12 am

1. North Bay’s arenas are well used, with a **system-wide usage rate of 94% during prime time hours** (see Table 2). Historical arena data indicates that overall arena usage has remained high over the past several ice seasons, with the 2013 MURF Study reporting a usage rate of 95% during prime time hours for peak months. In general terms, utilization rates of 90% or greater are indicative of arenas that are being operated at capacity.
2. Arena **usage is strongest on weekdays**, with a prime time utilization rate of 97%, compared to 90% on weekends.
3. In any given week during the 2018/19 season, there may be **up to 15 hours per week of unscheduled prime time ice time** across the entire North Bay arena system, which is equivalent to approximately one-quarter of an ice pad. The majority of this time is on weekends. West Ferris Arena has the most unused ice (6 hours per week), while Memorial Gardens Arena and the Palangio Demarco Pad have 5 hours and 4 hours per week, respectively.
4. On a system-wide basis, **54% of non-prime time ice is used** (including hours scheduled for ice maintenance). This is consistent with non-prime time usage reported in the 2013 MURF Study (57%); see Figure 3. Consistent with the 2013 MURF Study, Memorial Gardens Arena has the highest non-prime time usage rate (72%), which is generally due to the fact that the size of the ice pad is favourable, particularly for competitive users. Adult users book the most hours during the non-prime time window – approximately 40 hours per week on a system-wide basis. Competitive users and youth organizations each schedule 25 hours of non-prime time ice per week. Approximately 19 hours of non-prime time ice per week are used for City-run programs such as Seniors & Tots Skate, Noon Hour Skate, Shiny and Family Skating.
5. Overall usage rates are highest at Palangio’s Kelly Pad (59 scheduled hours per week, 99% capacity). Strong levels of use are also observed at Palangio’s Demarco Pad and Memorial Gardens Arena (93% capacity). **Usage is lowest – though still strong – at West Ferris Arena** (49 scheduled hours per week, 90% capacity); see Figure 2.

6. **Youth sports organizations** play predominantly at Pete Palangio and West Ferris Arenas (between 44 and 52 hours per week per pad). Youth groups book less time (nearly 28 hours per week) at Memorial Gardens Arena. Palangio’s Kelly Pad is the primary venue for **adult/casual bookings** (eight hours per week), although groups also book three to four hours per week at each of the City’s other ice pads. **Competitive sport organizations** rent the majority of their time at Memorial Gardens Arena.

Due to new competitive organizations such as North Bay’s OHL Team, Nipissing Women’s Varsity team, and the growing AAA Trappers organization, **prime time ice usage for competitive and youth groups increased by 8 hours per week since the 2013 MURF Study**. The increase in ice allocation for these organizations impacted adult users, which declined by 4 hours per week (see Table 3).

Table 2: Typical Weekly Usage – North Bay Arenas (4 ice pads), 2018/19

Group	Prime-time Hours	Non-Prime Hours	TOTAL HOURS
<i>Definition</i>	<i>M-F 4pm-10pm S-S 7am-10pm</i>	<i>M-F 7am-4pm M-S 10pm-12am</i>	
Youth / Special Needs (Minor/Girls Hockey, Ringette, Figure Skating, etc.)	173	10.5	183.5
Adult Hockey & Casual Rentals	19.75	35	54.75
Contracts (OHL, University, Midget AAA Trappers)	30.25	25.75	56
City Programs / Public Skating	2	19	21
Ice Maintenance	0	36.5	36.5
TOTAL HOURS USED PER WEEK	225	126.75	351.75
TOTAL HOURS AVAILABLE PER WEEK (4 pads)	240	236	
UTILIZATION	94%	54%	
AVERAGE HOURS UNUSED PER WEEK	15	109.25	

Note: Totals may not add due to rounding. These schedules are based on pre-booked times and may differ slightly from actual usages due to turned back ice, make-up games, unscheduled maintenance, tournaments or last-minute bookings.

Table 3: Change in Prime Time Ice Usage, 2011/12 Season to 2018/19 Season

Group	2011/12 Prime Time Season	2018/19 Prime Time Season	Change
Youth / Special Needs (Minor/Girls Hockey, Ringette, Figure Skating, etc.)	170.25	173	2.75
Adult Hockey & Casual Rentals	24	19.75	-4.25
Contracts (OHL, University, Midget AAA Trappers)	25	30.25	5.25
City Programs / Public Skating	2	2	0
Ice Maintenance	0	0	0
TOTAL PRIME TIME HOURS USED PER WEEK	221.25	225	3.75

Note: Totals may not add due to rounding. These schedules are based on pre-booked times and may differ slightly from actual usages due to turned back ice, make-up games, unscheduled maintenance, tournaments or last-minute bookings.

Figure 2: Typical Weekly Prime Time Hours Booked, 2018/19

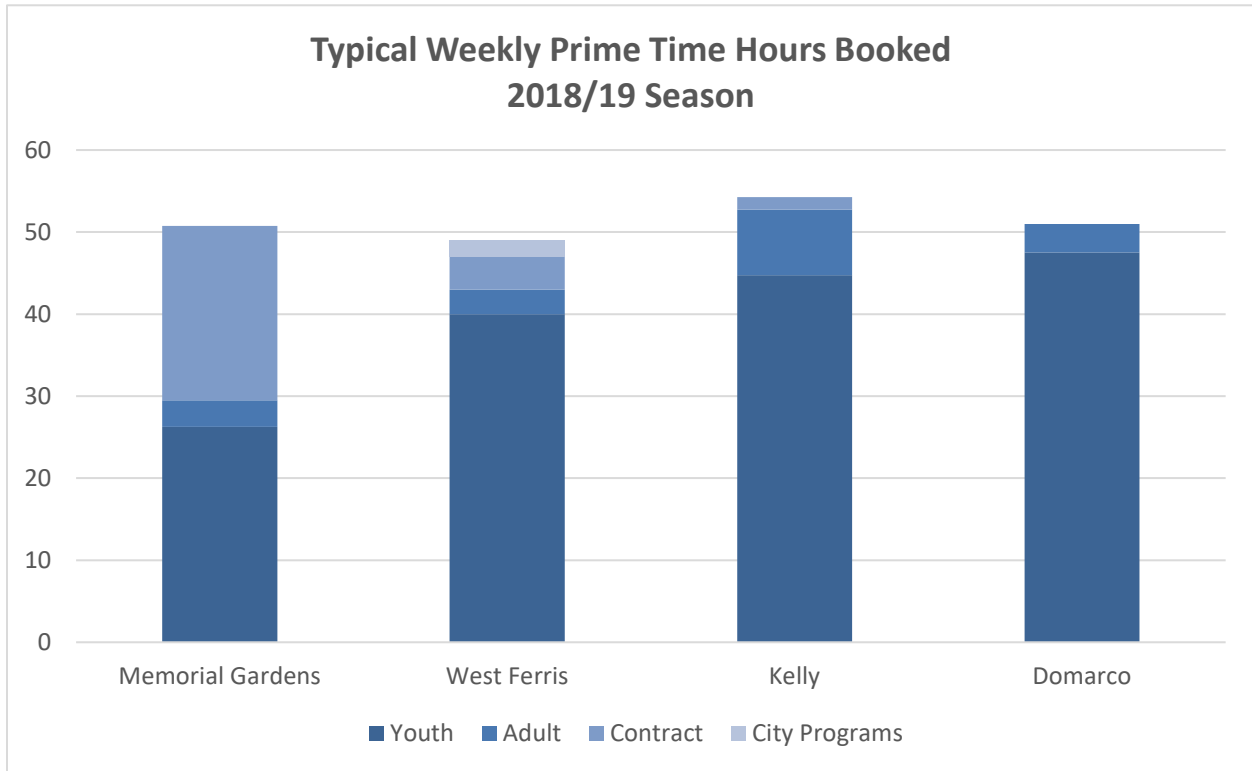
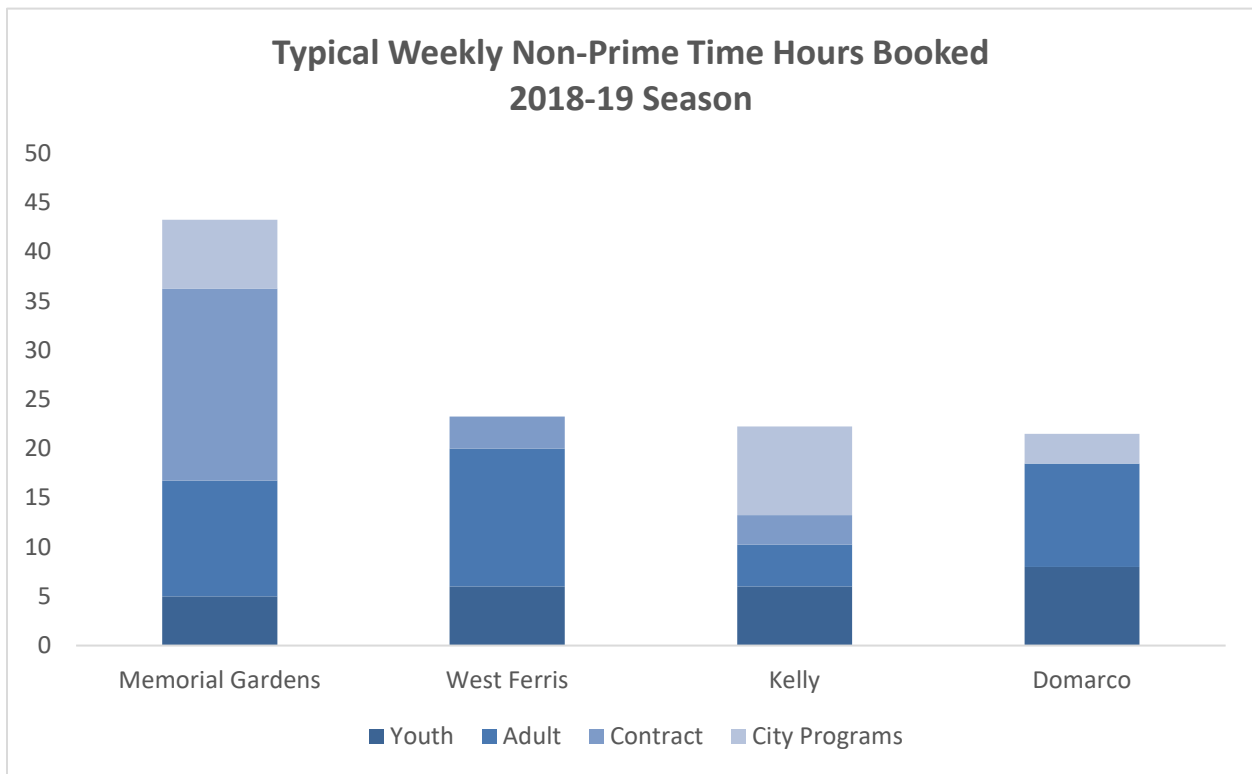


Figure 3: Typical Weekly Non-Prime Time Hours Booked, 2018/19



Arenas in Surrounding Communities

To meet the needs of their programs, some of North Bay’s ice user groups utilize ice time in arenas situated outside of the City. Conversely, no outside groups use City of North Bay arenas on a regular basis. Traveling outside the community to access available ice time has been a historic practice, although it may not be a sustainable solution for all North Bay residents as stakeholders reported challenges with travel time and access.

North Bay’s ice organizations have stated a strong interest in using ice time locally, though it is noted that rental rates in outlying communities tend to be lower and the rental times are often more favourable. Discussions with stakeholders indicated that the potential savings in renting ice in outlying communities is offset by ancillary spending (e.g., gas, restaurants, shopping, etc.) that could be otherwise spent in North Bay if there was ice time available within the City.

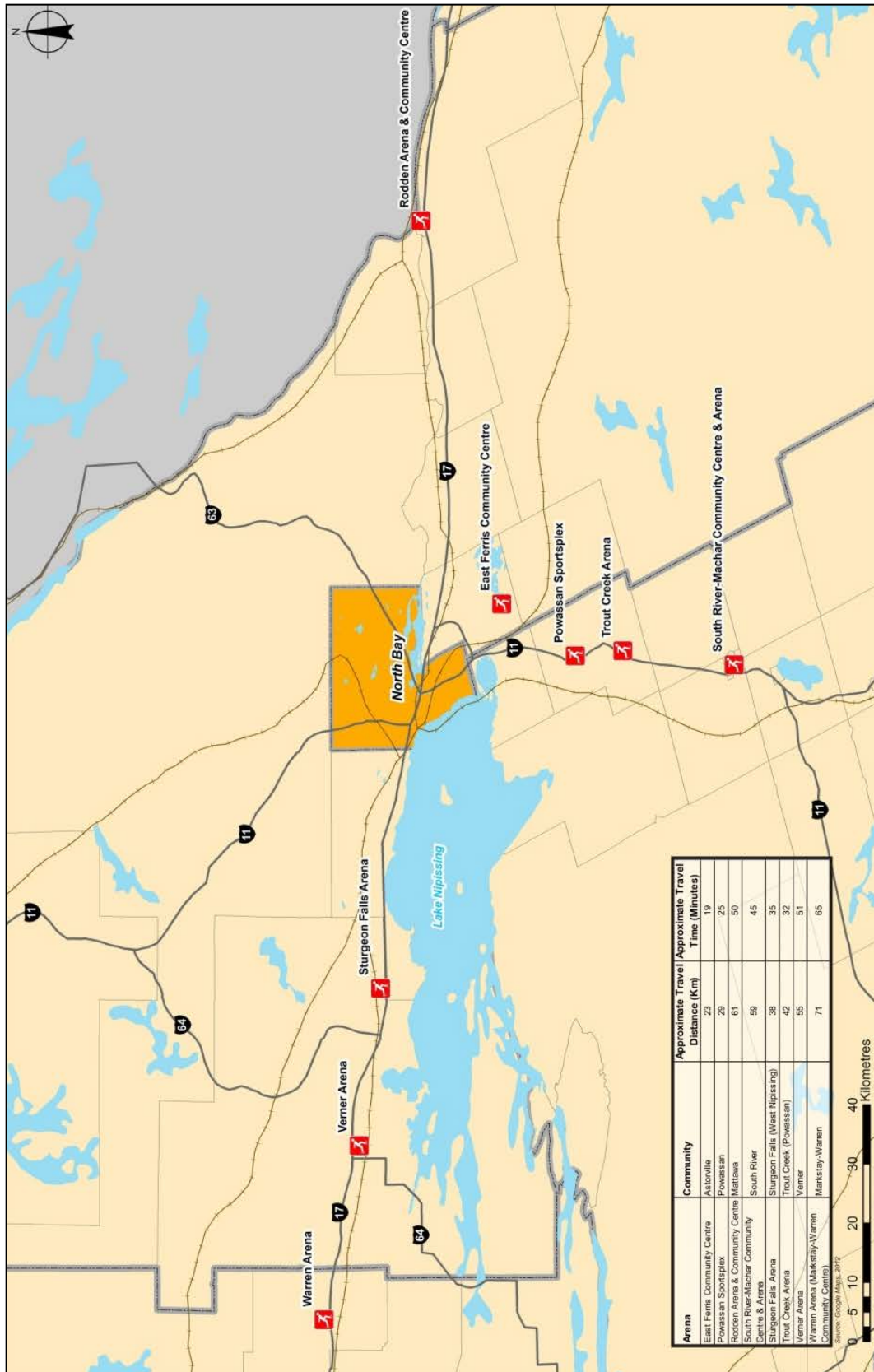
To establish a comprehensive understanding of local arena demand, information has been compiled on the availability of arenas surrounding the City of North Bay. The research focussed on the eight arenas (all single pads) that are closest to the City of North Bay, ranging in travel time from approximately 18 to 65 minutes from the centre of the City.

Table 4: Estimated Travel Time & Distance to Other Arenas

From	To	Distance (km)	Travel Time (min.)
North Bay Memorial Gardens Arena	East Ferris Community Centre (East Ferris)	23	18 to 19
	Powassan Sportsplex (Powassan)	29	21 to 25
	Sturgeon Falls Community Centre (West Nipissing)	38	30 to 35
	Trout Creek Arena (Powassan)	42	28 to 32
	Verner Arena (West Nipissing)	55	42 to 51
	South River-Machar Community Centre & Arena (South River-Machar)	59	37 to 45
	Mike Rodden Arena (Mattawa)	61	42 to 50
	Warren Arena (Warren)	71	52 to 65

Source: Google Maps

Figure 4: Arena Supply in Surrounding Communities



Arena managers in surrounding municipalities were contacted to understand existing capacity, the degree to which outlying arenas support North Bay organizations, and to determine how these arenas may be impacted if changes were made to the City’s arena supply.

Table 5: Utilization of Arenas in Surrounding Communities, 2018/19 Season

Facility	General Utilization
Trout Creek Arena (Powassan)	<ul style="list-style-type: none"> • Fairly well used on weekdays with ice time available on weekends • Plenty of non-prime time hours available during the week • Utilization has been stable over the past few years; do not expect this to change in the coming years • Approximately 75% of prime time ice is used by North Bay groups and as a result, increasing the number of ice pads in North Bay may have a negative impact at this location
East Ferris Community Centre (East Ferris)	<ul style="list-style-type: none"> • Weekdays and weekends are fully booked with some availability around the holidays • The majority of prime time ice is booked by local organizations • Approximately 10% of ice time is booked by North Bay organizations • Anticipate that ice usage will decline in the future due to the declining youth population and the rising cost of renting ice • Believe that ice usage would be impacted if North Bay’s arena supply is increased
Powassan Sportsplex (Powassan)	<ul style="list-style-type: none"> • Weekdays and weekends are fully booked with some availability after 11pm during the week and after 10pm during the weekend • North Bay users rent approximately 6 hours per week • It is expected that usage will decline if North Bay expands its arena supply, although this decline may be offset by other users seeking prime time ice
Sturgeon Falls Community Centre (West Nipissing)	<ul style="list-style-type: none"> • Arena is generally used by a mix of local and regional users, including some North Bay groups • Prime time arena usage has declined over the past few years due to the District’s aging demographic • Arena usage is not expected to be impacted significantly if North Bay expands its arena supply as they are not major users at this location
Verner Arena (West Nipissing)	<ul style="list-style-type: none"> • Arena is generally used by a mix of local and regional users, including North Bay groups • Prime time arena usage has declined over the past few years due to the District’s aging demographic • There would likely be limited impact on arena usage if North Bay expands its arena supply
Mike Rodden Arena (Mattawa)	<ul style="list-style-type: none"> • Weekdays are fully booked during prime time hours • Weekends are utilized 60% of the time with the majority of open ice time available in the morning; time is also available during the afternoon • The majority of ice users are local organizations; one team from North Bay rents ice once a week for practice (1.5 hours) • Arena usage would not be significantly impacted if North Bay’s arena supply changed

Facility	General Utilization
South River-Machar Community Centre & Arena (South River-Machar)	<ul style="list-style-type: none"> • Prime time hours are fully booked on weekdays • Weekend prime time hours are at 40% capacity with afternoon ice availability • The majority of ice rentals are local organizations; four groups from North Bay rent weekend ice for practices (approximately 4-6 hours) • Arena usage has increased over the past few years due to an increase in local minor hockey; anticipate that usage will continue to increase or stabilize in the future • A change in North Bay’s arena supply is expected to have limited impact at this arena given that the majority of ice is rented by local organizations
Warren Arena (Warren)	<ul style="list-style-type: none"> • Weekdays are used well with four prime time hours available • Weekends have a moderate level of usage with six hours available on weekend • Approximately 60% of prime time ice is used by local organizations; one North Bay organization rents ice Sunday morning (1.5 hours) • Anticipate that there would be limited impact to utilization rates if North Bay’s arena supply changes

The research indicates that regional arenas are well used during weekday prime time (generally between 5pm and 10pm). Some arenas (Trout Creek, Rodden, and, South River) have weekend availability, particularly during the morning or late evenings. Most notably, some arenas (particularly Trout Creek) rely heavily on usage from North Bay organizations to fill their time. If the City of North Bay were to expand its arena supply, it is possible that the Trout Creek Arena would be impacted, though there would also likely be a shifting of usage amongst all regional arenas.

There are currently no known planned arena developments in surrounding municipalities at this time, nor are there any planned closures in the regional arena supply. However, most of the arenas in surrounding municipalities are older buildings that have similar aging infrastructure challenges to North Bay’s community arenas. The interest and ability of these municipalities to invest in or replace their arenas when they reach the end of their lifespan is unknown.

Lastly, a review of 2006 and 2016 Census population statistics was undertaken to develop a cursory indicator of arena demand in surrounding municipalities. For example, communities with a declining number of children and youth may negatively impact arena usage given that these age cohorts tend to be the largest user of prime time ice. Communities that were evaluated were East Ferris, Powassan, Mattawa, South River, West Nipissing, and Markstay-Warren; each of these communities have at least one arena.

The research reveals that the surrounding municipalities experienced growth (9%) in the number of children (age 0 to 9), but a decline (15%) in the number of youth (age 10 to 19). This growth may be linked to the growth of adults (by 265 persons or 7%) who are in their child-bearing years. Communities that experienced a growth in the children population include East Ferris, Powassan, West Nipissing, and Markstay-Warren. This may lead to moderate increases in demand for local ice time in most surrounding municipalities over the coming years. Like North Bay, the population in these communities is also aging with the greatest growth in the older adult and senior age cohorts.

Table 6: Total Regional Population Growth by Age Group, 2006 – 2016

Arena	2016	2026	Change (#)	(%)
Children (0-9)	2,570	2,795	225	9%
Youth (10-19)	3,505	2,995	-510	-15%
Adult (20-34)	3,615	3,880	265	7%
Mature Adult (35-54)	8,270	7,395	-875	-11%
Older Adult (55-69)	5,355	6,970	1,615	30%
Senior (70+)	3,195	4,255	1,060	33%
Total	26,510	28,290	1,780	7%

*Note: Regional municipalities include East Ferris, Powassan, Mattawa, South River, West Nipissing, and Markstay-Warren.
Source: Statistics Canada 2006 and 2016 Census.*

2.2 Participation Trends

General Recreation Trends

Understanding trends can assist with anticipating shifts in the demand for arenas. The following trends – based on local, provincial and national research – may be directly or indirectly related to the potential demand for arenas and broader recreation services in North Bay.



Aging Population

- Municipalities across North America are experiencing an aging of the population as the baby boomer generation move through the age cohorts.
- Between the 2011 and 2016 Census, North Bay’s older adult and senior population (age 55+) experienced a growth of 1,380 residents, representing a growth of 9%. During this period, all other age groups declined by a combined total of 3,485 residents.
- There is a growing need for accessible facilities providing new program choices for older adults and seniors’ (e.g., pickleball, walking, fitness, etc.).

High Levels of Physical Inactivity

- The 2018 ParticipACTION report card on physical activity for children and youth graded overall physical activity levels a “D+”¹, which is a marginal improvement over previous years.
- Nearly one-third of Canadian children and youth (age 5-17) are obese or overweight, which was an increase from 23% reported in 1979.² Almost two-thirds (64%) of adults over the age of 18 are obese or overweight, which was an increase from 49% in 1979.³
- In a 2013 health profile prepared by Statistics Canada for North Bay Parry Sound District Health Unit, 57.1% of the population was found to be ‘active’ or ‘moderately active’ during leisure time physical activity, which a decline from 59.1% in 2011 but higher than the Province (53.8%).⁴
- Reliance on automobiles (as opposed to walking or biking) has contributed to a culture of physical inactivity, while sedentary activities such as watching television, playing video games, or using a computer further exacerbate sedentary behaviours.

Focus on Active Living and Wellness

- The Healthy Communities movement recognizes that recreation and leisure are vital contributors to social and personal health. Active living is a primary goal of the 2015 Framework for Recreation in Canada.
- Municipalities are focusing on strategies to improve the activity levels, health and wellbeing of their residents. North Bay’s 2017-2027 Strategic Plan identifies healthy living and recreation as a priority.
- The City’s 2019 Active Transportation Plan helps to support wellness and active living through connecting neighbours, neighbourhoods and the city overall.
- Older adults are remaining active later in life their interests are shifting away from traditional seniors’ activities and towards leisure opportunities focused on wellness and active living.

Growth in Unstructured Activities

- The primary barrier to recreational participation for both youth and adults is a lack of free time.
- Due to increasingly busy lifestyles, competing interests, and the inability for many people to commit to structured activities, there has been a growing desire for drop-in and unstructured activities that can be self-scheduled.
- Municipalities are seeking strategies such as extending hours of operation, providing more drop-in activities, offering programs at different times of the day, and more.
- North Bay provides flexible opportunities to engage in recreation, largely through its parks, trails and outdoor spaces. The 2013 MURF Study identified demand for flexible indoor spaces that could be used for structured and unstructured recreation.

¹ The ParticipACTION report card on physical activity for children and youth. 2018 Retrieved from <https://participaction.cdn.prismic.io>

² Public Health Agency of Canada. Tackling obesity in Canada: Childhood obesity and excess weight rates in Canada. 2017. Retrieved from <https://www.canada.ca>

³ Ibid

⁴ Statistics Canada. 2013. Health Profile. Statistics Canada Catalogue No. 82-228-XWE. Ottawa. 2013. Retrieved from <https://www12.statcan.gc.ca>

Affordability Concerns

- Income remains a significant barrier to participation in recreation activities, particularly organized sports such as ice sports.
- Financial assistance programs (e.g., Kidsport North Bay) and low-to-no-cost programming options can help alleviate the financial burden of participation.
- North Bay's 2015 median after-tax household income was \$54,455, which is lower than the Province (\$65,285). Affordability is a key concern for many households as recreation is one of several spending choices for discretionary income.

Ice Sport Registration – Ontario and Canada

Registration in Hockey Canada (both in Ontario and Canada) has declined since peaking in the 2008-2009 season.⁵ In 2011, it was estimated that 9% of Canadian children and youth played hockey, which was half the percentage that played 20 years prior.⁶ This decline may be linked to the high cost to participate, concerns over safety, competing interests, aging population, and more. Across the nation and including North Bay, the most recent gains in hockey participation have largely been a result of girls' hockey.

The window of core prime time ice is shrinking as most groups desire the use of early prime time hours. Groups are increasingly reluctant to utilize ice time during the morning, shoulders, and late prime time, placing pressures on groups' ability to expand memberships.

Ice Sport Registration – North Bay

Participation data provided by the City indicated that there are approximately **2,947 registered participants** using North Bay arenas for the 2018/19 ice season. Of this amount, 1,839 (62%) are youth/special needs users, 904 (31%) are adult users, and 204 (7%) belong to competitive/contract organizations. This represents a decrease of 165 participants (-5%) compared to the 3,112 participants reported in the 2013 MURF Study.

⁵ Hockey Canada Annual General Meeting Reports

⁶ Kaufman, B. (2011). Hockey Losing Numbers Game: Minor ranks don't do enough to appeal to new Canadians. London Free Press. Available online at www.lfpress.com

Table 7: Summary of Arena Participation Trends, 2011/12 to 2018/19

Arena Organization	2012/13	2018/19	Change
Youth/Special Needs Organizations			
Nipissing District Athletics (High School)	108	100	-8
North Bay District Girls Hockey Association	280	304	24
North Bay Figure Skating Club	277	199	-78
North Bay Ice Breakers	-	11	11
North Bay Minor Hockey Association	200	100	-100
North Bay Sledge Hockey	17	20	3
North Bay North Stars	35	50	15
West Ferris Minor Hockey	779	800	21
West Ferris Ringette Association	235	255	20
Subtotal	1,931	1,839	-92
Adult Organizations			
Canadore College Intramural Hockey	150	100	-50
Casual Adult Rentals	480	364	-116
Nipissing University Intramural Hockey	140	100	-40
North Bay Mercantile League	240	240	0
North Bay Oldtimers League	90	100	10
Subtotal	1,100	904	-196
Competitive/Contract Organizations			
Canadore College Varsity Hockey Team	16	-	-
Nipissing Varsity Hockey Team (Men's)	25	26	1
Nipissing Varsity Hockey Team (Women's)	-	26	26
North Bay Midget Trappers	20	18	-2
North Bay & District AAA Trappers	20	108	88
North Bay Battalion Hockey Club (OHL)	-	26	26
Subtotal	81	204	123
Total	3,112	2,947	-165

Source: City of North Bay

Since the 2013 MURF Study was completed, participation in **youth/special needs organizations** declined 8% to 1,839 registrants, which was primarily due to a decrease in the number of minor hockey participants (-100 players); figure skating also experienced a drop of 78 participants. While participation in girls' hockey declined marginally, broader national trends (including discussions with stakeholders) suggest that demand for ice time to support girls' hockey is increasing as the sport expands its levels of play and competition.

Adult ice users experienced a participation decline of 18% to 904 participants since the 2013 MURF Study. The number of casual users declined the most (-116), while participation in Nipissing and Canadore intramurals dropped by 50 and 40 users, respectively. This decline in adult participation is driven by a number of factors. Through the City's ice allocation policy, priority is given to contract users and youth organizations. As demand for these uses grows, adult groups are being allocated fewer hours.

While some adult rentals may have moved to arenas outside the City, the University and College indicate that their participation rates have been impacted by the move to later, less desirable hours (couple with transportation barriers for many students).

The greatest change to North Bay's participation profile is the emergence of new **competitive organizations**, which has more than doubled since the 2013 MURF Study to 204 participants due to the influence of the OHL's arrival in the City, the expansion of the AAA Trappers and the addition of the Nipissing University women's varsity team. While these competitive players represent a small portion of the total number of participants, the City is contractually obligated to provide them with sufficient ice time (primarily at Memorial Gardens Arena) and – due to the nature of their activities – they require more ice time per participant than typical youth or adult participants. As a result, the way in which the City allocates ice time has been significantly impacted.

Based on the foregoing, the following capture rates have been identified for North Bay:

- 1) **The local youth capture rate in ice sports is approximately 22%** based on current participant and population estimates. This rate is in the middle of the common range seen in other communities (which average about 20-25%, meaning that 1 out of every 4 to 5 children play ice sports).
- 2) **The local adult capture rate in ice sports is approximately 4%** based on current participant and population estimates. This rate is also in-line with most other communities (which average about 4%, meaning that 1 out of every 25 adults play ice sports).

2.3 Demographics

To establish a strong foundation for assessing arena needs, North Bay's community profile is examined in this section, including historical and projected population growth, age profile and distribution, population composition, and education and income levels. Statistics Canada was the primary source of information, which was augmented by updated population data and forecasts.

Historical and Forecasted Population

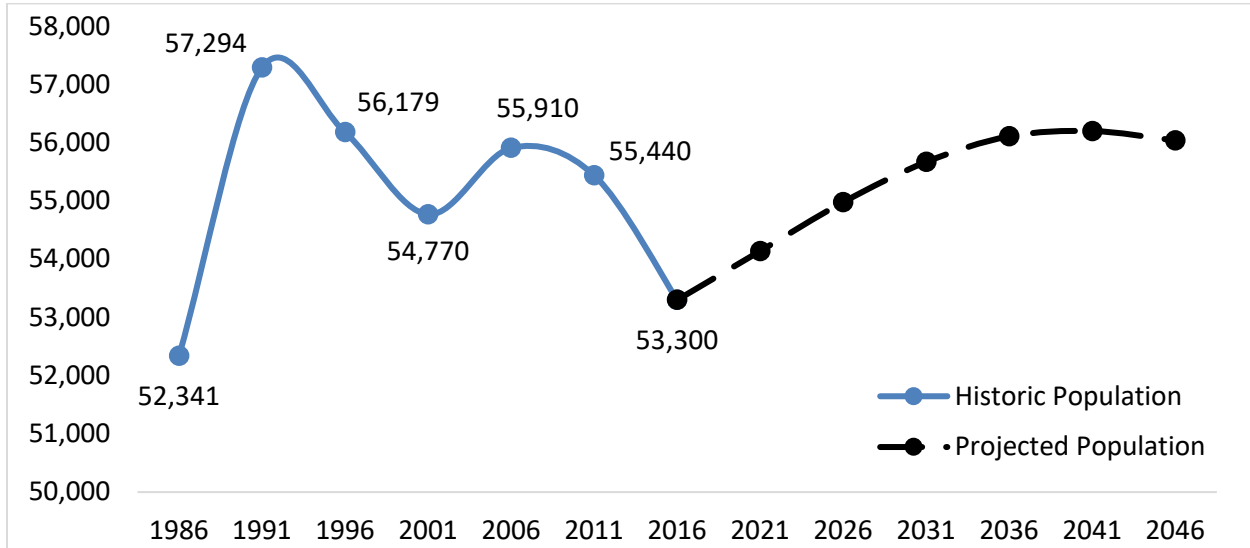
The City of North Bay has experienced population growth and decline over the past three decades. The years between 1986 and 1991 were a period of considerable population growth, which was followed by a decade of population decline until 2001. Between 2001 and 2011, North Bay's population began to rise again; however, the City is once again experiencing population decline. Statistics Canada reported a population of 51,555 in the 2016 Census, which was a 4% decline from the 2011 Census (53,660).⁷

It is understood that North Bay is pursuing an aggressive growth strategy based on various economic development initiatives related to arts, culture and creative industries, e-commerce, transportation, aviation and aerospace industries, investment in major infrastructure, and the development of employment drivers such as the casino. Efforts to drive in-migration are also being explored.

⁷ Statistics Canada, 2011-2016 Census.

With these initiatives in mind, the projections available to the consultant suggest that North Bay’s population will increase by 5% between 2016 and 2046 (Figure 5). An interpolation of the data provides a 2019 population estimate of 53,804 (including undercount).⁸

Figure 5: City of North Bay Historical and Forecasted Population; 1986 – 2046



Note: Population figures include Census undercount.

Sources: Statistics Canada, 1986-2016; City of North Bay draft population projections (2019).

Age Profile

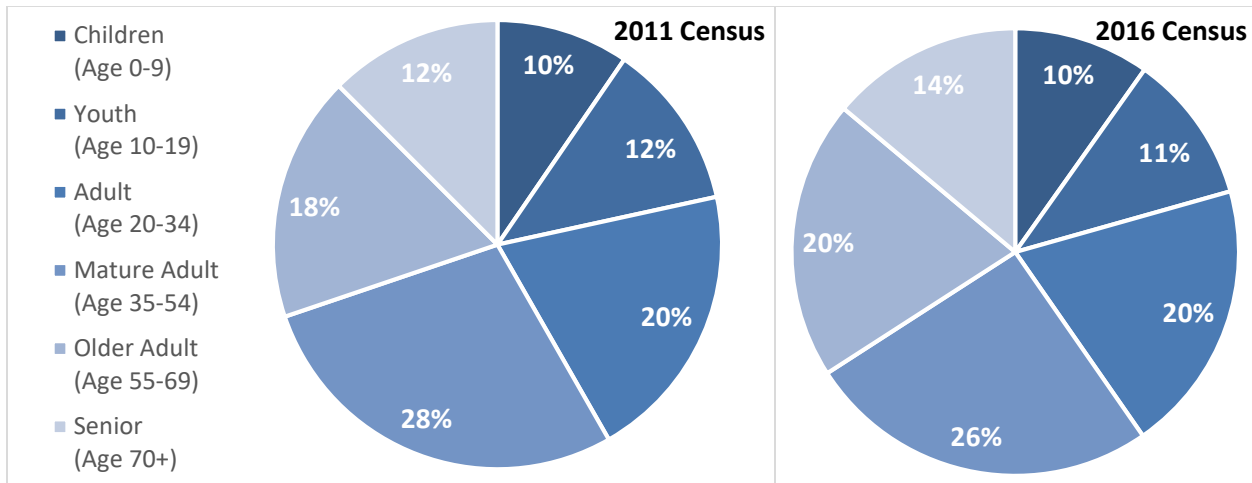
Analysis of North Bay’s age structure offers insights into the types of recreation pursuits that may be desirable to residents. Communities with higher proportions of children and youth tend to have strong participation levels in active recreation activities such as ice sports. By contrast, a large market of older adults and seniors may drive demand for lower impact recreation pursuits, which tend to be non-ice oriented.

Like many municipalities across the Province, North Bay’s population is aging as the baby boomer generation moves through the age cohorts. Statistics Canada reported a median age increase from 42.1 years to 43.7 years for North Bay between the 2011 and 2016 Census. North Bay’s population is presently older than the Provincial median age of 41.3 years.

Between the 2011 and 2016 Census, North Bay’s older adults (55 to 69 years) and seniors (70 years and over) experienced a combined growth of 1,380 persons or 9%. All other age groups declined during this time period. Most notable for this analysis, the number of children (0 to 9 years) declined by 70 persons and the number of youth (10 to 19 years) declined by 880 persons (Figure 6).

⁸ Hemson Consulting. Growth Forecast to 2046. February 2019.

Figure 6: City of North Bay Age Profile, 2011 – 2016



Source: Statistics Canada, 2011 and 2016 Census

As illustrated in Table 8, North Bay’s senior age cohort (70 years and over) is expected to drive the majority of the City’s population growth between 2016 and 2046 with growth of 71%. By contrast, all other age groups are expected to decline during this time period. **If ice demand mirrors the population projections for children and youth (primary users of prime time ice), ice demand can be anticipated to remain relatively stable until around 2036, after which declines are forecasted.**

The projected decline of younger age groups is primarily driven by out-migration as the adult population move to seek employment opportunities elsewhere. This out-migration of the adult population influences the number of new births, thus impacting future population growth.⁹

Table 8: City of North Bay Projected Population by Age Cohort, 2016 – 2046

Age Group	Change 2016 – 2046
Children (0-9)	-13%
Youth (10-19)	-1%
Adult (20-34)	-18%
Mature Adult (35-54)	0%
Older Adult (55-69)	3%
Senior (70+)	71%
Total	5%

Note: Includes Census undercount

Source: City of North Bay draft population projections (2019).

⁹ Hemson Consulting. Growth Forecast to 2046. 2019.

Income and Education

Research found that income and education levels influence (or at least are an indicator of) participation levels in recreation opportunities. Generally speaking, the greater a person's level of income and education, the more likely they are to participate in such activities.

The City of North Bay's median after-tax income for all private households was \$54,455 for 2015, which is well below the provincial median of \$65,285. In terms of educational attainment, the percentage of the City's population that has completed a University or College degree or diploma (46%) is similar to the Provincial average (47%). For economic reasons, residents may be slightly less likely to participate in recreation activities, particularly those that have economic barriers.

Immigration and Diversity

Participation in and accessibility of recreation opportunities is often impacted by immigration and diversity levels. According to the 2016 Census, 5% of residents in North Bay are immigrants (born outside of Canada). Between 2006 and 2016, less than 1% of the population immigrated to North Bay (485 residents), which is much lower compared to the Provincial rate of 7.2%. As the vast majority of the City's population are non-immigrants, barriers to participation associated with ethnicity or language are not likely to be significant in North Bay.

2.4 Stakeholder Input

This section summarizes the input received from our consultations with North Bay arena user groups and organizations. This information – including registration data, requests for hours, key demands and more – was critical to establishing a profile of arena use and potential future demand.

Stakeholders were invited to participate in this study through a variety of ways:

1. Stakeholders were requested to complete an **organization-wide questionnaire** that examined participation levels, trends and demand pressures.
2. A stakeholder **workshop** was held on February 21, 2019 to provide an opportunity to bring together representatives of various arena users to discuss current usage patterns and future ice needs in North Bay. Verbal and written input was collected.
3. Follow-up **interviews** were held with key organizations that were unable to participate in the workshop.
4. A **team-based questionnaire** was also prepared for coaches of competitive teams that may rent ice outside of North Bay to provide their perspectives on arena usage. Surveys from 12 individual teams were received and analyzed.

The following 13 organizations participated in the consultation program:

- Canadore College Athletics
- Men's & Women's Lakers (Nipissing OUA)
- NDA High School Hockey
- Nipissing Intramural Hockey
- North Bay & District AAA Trappers Association
- North Bay & District Girls Hockey Association
- North Bay Battalion (OHL)
- North Bay Figure Skating Club
- North Bay Ice Breakers
- North Bay Mercantile League
- North Bay North Stars
- West Ferris Minor Hockey Association
- West Ferris Ringette Association

The following table summarizes the primary input provided by stakeholders, including an estimate of the number of hours rented outside of North Bay and requests for additional ice requirements.

Table 9: Number of New Hours Requested Per Week from Arena Stakeholders

Arena Organization	Approx. Hours Rented Outside of North Bay (per week)	Number of New Hours Requested (per week)	Purpose of New Hours Requested
Canadore College	None	Amount not specified	Earlier prime time ice was requested; potential to add a tournament
North Bay Figure Skating Club	None	4 hours	1 hour for pre-CanSkate, 1 hour for adult learn to skate, 2 hours for figure skating
North Bay and District Girls Hockey Association	6 to 10 hours	6 to 10 hours	Eliminate practice outside of North Bay; additional time may also be required to accommodate new rep teams that are currently playing in Southern Ontario
North Bay and District Hockey Association	Not specified	Amount not specified	Prime time ice at a large ice surface (e.g., Memorial Gardens) was requested
North Bay and District Trappers AAA Association	Not specified	30 hours	Additional games and practices and to eliminate practice outside of North Bay
North Bay Mercantile League	Not specified	20 hours	To accommodate other men's leagues that can no longer get ice in North Bay
North Bay North Stars	Not specified	None at this time	Earlier prime time ice was requested
Nipissing Athletics (Intramural)	None	None at this time	Earlier prime time ice was requested
Nipissing Lakers	None	1.5 hours	Additional practice
West Ferris Minor Hockey Association	33 hours	50 hours	7 hours for house league, 10 hours, 33 hours to eliminate practice outside of North Bay
West Ferris Ringette	Not specified	3 hours	1.5 hours each for new U8 and U10 programs
TOTAL	39 to 43 hours	114.5 to 118.5 hours	

Key findings from the stakeholder consultations are highlighted below:

1. Stakeholders were unanimous in their support for **increasing the supply of ice** within North Bay.
2. The majority of groups expressed the desire to expand (or have recently expanded) the scope of their programs. Groups indicated that they have added (or are in the process of adding) new teams or divisions in order to respond to growing programming interests. To accommodate these growing needs, **many groups are seeking additional ice time** in North Bay or beyond.
3. Most groups cited a **lack of available/sufficient ice time**, combined with **undersized ice pads**, as having a negative effect on their programs through:
 - Waitlists or registration cut-offs

- Limited opportunities for program expansion and restricted growth
 - Reduced competitiveness with other centres (e.g., fewer practices)
 - Inability to host tournaments and events
4. Some groups expressed the desire to **replace aging arenas** in North Bay, most notably West Ferris Arena and, to a slightly lesser degree, Pete Palangio Arena. Some groups indicated that playing at these aging facilities is not ideal given that they are undersized, not barrier-free, and do not offer the amenities that are commonly found at modern arenas. Some felt that the poor state of the arenas is a deterrent to hosting tournaments and events.
 5. Some groups expressed **concern over scheduling** and indicated that the prime time ice slots that they are allocated are not conducive to their program. For example, early evening times are preferred for younger children. Additionally, an adult league indicated that they cannot starting games later than 10:30 pm without concern over losing members.
 6. Approximately **117 additional prime time hours** per week were requested from stakeholders to provide new programs, practices and games. This also includes approximately 41 hours of ice time per week that is currently rented outside of North Bay that stakeholders would reallocate within North Bay if given the opportunity (Table 9).
 7. Rep and adult hockey teams frequently **rent prime time ice in other communities** due to the lack of available time in North Bay. Many rep coaches rent up to three hours per week for practices at arenas in other communities because they cannot get sufficient ice time through their associations. Even with these rentals, some coaches identified that they still require additional hours, but the competition for rentals is strong.
 8. Arenas in surrounding communities have more convenient times and affordable ice rates; however, these arenas are aging and travelling is often a challenge, particularly for younger participants. Organizations strongly felt that their **participants would prefer to play in North Bay** and are open to paying the City's higher rental fees in the interest of reducing travel time and ancillary spending in other communities.
 9. Stakeholders suggested that the following **amenities and characteristics** should be considered as part of future arena developments:
 - Multiple pads at one location
 - Regulation-size pads (NHL-size, 200' x 85')
 - Spectator seating (varying capacities per ice pad)
 - Large changerooms
 - Storage and office space
 - Sufficient parking
 - Access to public transportation
 - Barrier-free accessibility
 - Multi-purpose space (e.g., meeting rooms, dry-land training space, hall)
 - Other recreational spaces (e.g., indoor walking/running track, gymnasium, fitness space)
 - Opportunities for sport tourism, sponsorships and revenue generation (e.g., restaurant)
 - Opportunities for future expansion
 - Centrally located

Section 3: Updated Arena Needs Assessment

This section provides an updated arena needs assessment to the 2013 MURF Study based on the inputs identified in Section 2.

Figure 7: Factors considered in the Arena Needs Assessment

Existing Arenas	Participation Trends	Demographics	Stakeholder Input
<ul style="list-style-type: none"> • Ice Utilization • Limitations of City Rinks • Availability of Outside Rinks 	<ul style="list-style-type: none"> • General Trends in Recreation • Sport Registration Levels 	<ul style="list-style-type: none"> • Population Characteristics (e.g, age) • Population Projections 	<ul style="list-style-type: none"> • Challenges and Opportunities • Requests for Additional Ice Time

These inputs have been analyzed to develop a North Bay-specific provision target that represents a recommended measure of arena demand based on a combination of accepted industry standards, market-driven factors and other local circumstances. The statement of need is based on ice usage during peak season and has not been adjusted for potential non-ice events that may reduce the availability of ice time.

3.1 Influencing Factors

The following discussion summarizes key factors that are impacting demand for arena facilities in the City of North Bay.

1. **Arenas in North Bay are used to capacity.** The City has experienced pressures for ice time from new groups since the 2013 MURF Study was completed, which has impacted other users, particularly adult groups and post-secondary intramural users. To make up for the lack of ice time, some groups (e.g., minor house league) are expanding rosters and sharing practices into older age groups; this is particularly challenging given the City’s undersized ice pads.
2. **Increases in youth ice sport registration are possible given that this age group (ages 5 to 19 years) is projected to increase by 4.5% between 2019 and 2036, then declining beyond this time.** This represents a reversal of the trend that has seen the number of youth in North Bay drop by 17% over the past ten years (2006-2016 Census). As youth are the primary user of the City’s arenas, this impacts the pool of core arena users. Since the 2013 MURF Study was completed, youth registration in organized ice activities decreased by 5%, although this has not translated to an overall decrease in ice utilization.
3. **Since the 2013 MURF Study was completed, the City’s arena facilities – all of which are now 45 years or older – have aged another six years.** Condition assessments for West Ferris Arena have identified challenges with respect to the timber roof trusses. Based on a recommended monitoring program, it was identified that the arena could continue to operate for another three years (until 2019). Updated assessments are required to confirm future operating

approvals. Pete Palangio Arena (the City's only twin pad arena) has also continued to age and the lack of barrier-free access has been a challenge for arena users and spectators.

4. **Since the 2013 MURF Study was completed, demand has increased as North Bay has added several competitive and travel teams.** The most notable change that occurred since the 2013 MURF Study was completed was the relocation of an OHL team. The AAA Trappers have also increased their participation and Nipissing University introduced a Women's Varsity team. Furthermore, new rep Girls' Hockey teams (currently playing in Southern Ontario) will be seeking local ice time beginning the 2019/20 season.

Arena schedules indicate that these competitive/contract users currently utilize approximately 31 prime time hours per week (equivalent to 0.5 ice pads based on 60 prime time hours per pad). This has had a trickle-down effect for other users, which now receive fewer and/or less desirable times.

5. **The majority of arena stakeholder groups stated a need for additional prime time ice, and this need is increasing.** There were requests for at least 115 additional prime time hours within North Bay from ten user groups. This is twice as much as the 56 hours of local prime time ice that were requested from organizations through the 2013 MURF Study, suggesting that pent-up demand for prime time ice has continued to increase over the past six years.

Through the stakeholder consultation process, users also expressed the desire to accommodate new participants, hold additional practices and games, offer more skill development opportunities and expand their programs. For example, West Ferris Minor Hockey Association is planning to add five new rep teams. There are also rep teams that are regularly traveling out of the City of North Bay for games and practices.

6. **Several arena organizations are travelling to arenas in outlying areas to get the ice time that they require, but groups want to play locally.** Many rep and adult organizations secure their own ice contracts; this is a longstanding practice, though one that appears to be increasing. This practice is inefficient as it bypasses a typical allocation framework, creates competition between teams, discourages joint practices and reduces the ability to track true ice demands. However, stakeholders indicated that they would strongly prefer to rent ice time in North Bay, despite sometimes receiving more favourable times and rates in surrounding communities.
7. **The demand for prime time ice (evenings and weekends before 10pm) is particularly acute as the window of acceptable rental times is shrinking.** Ice sports continue to be in demand in Canada, particularly at higher levels of competition, which leads to more time on the ice per participant. Trends in usage and participation suggests that demand will remain high, although fluctuations occur from sport to sport and region to region. For example – both locally and provincially – there has been considerable growth in the number of females playing hockey. Ice hockey remains popular with children and young teens and the aging population could result in greater demand for 55-plus hockey teams.
8. **Standards of play are changing and becoming more formalized, leading to greater ice requirements.** For example, beginning in 2018, Hockey Canada mandated that novice participants must play half ice (or cross ice) in an effort to boost fun and player development. While this change suggests that twice as many participants may be accommodated within the same period, Hockey Canada requires that half-ice be 100 feet by 85 feet, which can only be

accommodated at Memorial Gardens as North Bay's other ice pads are 180 feet by 80 feet (full ice). As a result, modified programs are required. In addition, the standards of play mandate minimum thresholds for game and practice time, which can be particularly challenging for the higher levels of play that require greater access.

9. **There is a strong desire for modern, quality arenas that offer multiple regulation-size ice pads.** Access to regulation-size ice pads (200' x 85') levels the playing field for all user groups, creates additional capacity, and bolsters a community's ability to attract and host tournaments. Memorial Gardens is the only arena in North Bay with an NHL-size ice pad and as a result, it is the most desirable ice pad in the City, particularly for competitive organizations. Several stakeholder groups indicated that they are unable to host or expand tournaments (e.g., Challenge Cup is capped at 44 teams with 15 teams on a waiting list) given the current supply, design and state of arenas.

Additionally, stakeholders expressed the desire for arena amenities such as a minimum of six large dressing rooms, multi-purpose space (dry-land training, meetings, etc.), recreational uses that appeal to residents of all ages (e.g., indoor walking/running track), opportunities for expansion, sufficient parking, and more.

The prior findings related to local usage, trends, demand pressures, regional supplies, and community input provide a basis for projecting current and future arena needs.

3.2 Needs Assessment Calculation

The City is contractually obligated to provide a fixed number of weekly prime time hours to support North Bay's OHL Team, Midget and AAA Trappers, and Nipissing University Hockey Teams. Based on a review of arena schedules, these competitive teams use approximately 31 hours of prime time ice per week, which is equivalent to 0.5 ice pads. The number of teams and participants will not change and is not impacted by participation or demographic trends. **Thus, for the purposes of this needs assessment, it is assumed that North Bay has 3.5 ice pads available for use by other hockey, ringette, figure skating and tournament/event users.**

The use of a market-driven provision target to assess arena needs is the preferred approach because it is able to account for generally accepted standards of play, arena usage patterns, demographic and arena trends, and other key factors. As a point of reference, the 2013 MURF Study used a participant-based provision target of one ice pad per 725 youth and adult participants.

Though updated research and consultation with stakeholders, a youth-based provision target is recommended moving forward as prime time ice needs for youth organizations have become more apparent. This approach better reflects how the City allocates ice time and ensures that youth have reasonable access to ice time outside of school hours. Adult ice usage (including post-secondary students) also tends to be more volatile as they require less ice time per participant and are more flexible in when and where they rent ice time.

A provision target of one ice pad per 400 to 450 youth participants is commonly applied in communities with a similar profile. This works out to an average of 8 to 9 minutes of weekly prime time ice time for each participant. Depending on age level, level of play, roster size and amount of out of town league play, this means that each team would receive the requisite number of hours for games and practices

(less for those that younger, in house league or CanSkate, and more for those that are older, in rep league or StarSkate).

With 1,839 youth participants, the City is currently providing a service level of one ice pad per 525 youth participants registered in North Bay organizations. This is above the typical range, further suggesting that there is a degree of pent-up demand, which is consistent with input received from arena stakeholders.

Given the indicators and demand factors identified in this Update, **a provision target of one ice pad per 425 youth participants is recommended for North Bay**. This represents the median of the typical range applied to identify long-term needs in similar communities and is consistent with the standards of play that are in effect for local youth hockey (house league and rep), ringette and figure skating in North Bay. It is also sufficient to accommodate a slate of tournaments that would be typical of a City the size of North Bay (approximately one per month).

The following table applies this provision target to 2018/19 registration and the estimated 2019 population, as well as population forecasts to identify future needs. This model assumes that participation rates will remain steady (22.4% of North Bay youth ages 5 to 19 are currently registered in ice sports) and the future usage profile will be similar to the current usage profile.

Table 10: Ice Pad Demand Analysis – City of North Bay

	2019	2026	2036	2046
Projected Participation – Youth (22.4% capture rate)	1,839	1,861	1,924	1,786
Provision Target	1 ice pad per 425 youth participants			
City -wide Needs (excluding ice time for competitive/contract use)	4.3	4.4	4.5	4.2
Existing Ice Pad Supply	3.5 pads (adjusted to account for equivalent of 0.5 ice pad allocated for competitive/contract use)			
Surplus (deficit)	(0.8)	(0.9)	(1.0)	(0.7)

Population projections are based on City of North Bay draft population projections (2019).

Based upon the current usage profile, recommended provision target and estimated participation, **there is currently a deficit of 0.8 ice pads**. This finding is based on the updated data collection and analysis, which is consistent with stakeholder input received that indicates a degree of pent-up demand

This level of demand is forecasted to remain very stable over the next two decades based on the updated population projections used in this study. In fact, the projection model calculated that **the deficit will increase to 1.0 ice pads by 2036** due to modest growth in the child/youth population. The forecasts suggest that the primary arena population will decline after 2036. By 2046, projections suggest that North Bay will have a deficit of 0.7 ice pads (a need for 4.7 ice pads).

Taking a conservative viewpoint, if a less aggressive population forecast scenario was applied, the demand calculation would be reduced only marginally. Should the demand figures projected in this study not be realized, it is expected that adult/casual user groups would move into more favourable times and possibly generate new demand as a result. Given the strength of the North Bay arena market

and potential new opportunities that an expanded ice supply would provide, sustained demand in the range of 0.7 to 1.0 additional ice pads **provides the confidence required to support the provision of an additional ice pad.**

The addition of a fifth ice pad in North Bay would enhance opportunities for organizations to offer consistent programs and capitalize on new opportunities. This facility would effectively add 60 prime time hours to the system-wide supply. Based on a deficit of 0.8 to 1.0 ice pads over the next two decades, the City should be able to conservatively fill an additional 48 to 60 prime time hours each week with youth organizations alone.

It is recognized that this projection amounts to nearly half of the 118 hours of additional prime time ice that was requested by stakeholders. However, it is important to note that a portion of this request was connected to completely eliminating arena usage outside of North Bay. The projection model utilized industry accepted metrics to validate local ice pad needs and also recognizes that organizations will remain free to rent available ice time wherever they choose. A conservative approach to projecting needs is an absolute necessity when informing decisions for major infrastructure projects.

3.3 Summary Statement of Need

Based on the preceding analysis, **there is presently sufficient demand to support a fifth indoor ice pad in the City of North Bay.** With a current inventory of four ice pads, this represents the addition of one pad to the supply. Two regulation-size ice pads (200 feet by 85 feet) would allow the City to accommodate the greatest number of users and help to maximize capacity. It is noted that the 2013 MURF Study recommended that all new construction should be in the form of multi-pad arenas so as to generate operational efficiencies, improved user convenience and tournament/event potential.

The demand for an additional ice pad is most strongly correlated with:

- a) increased ice time requirements for competitive organizations and higher levels of play;
- b) new programs, skill development, and sport tourism and tournament opportunities; and
- c) a strong desire for groups to rent increased ice time locally, instead of outside the City.

Due to the forecasted commitments made by stakeholders, the analysis suggests that prime time usage in peak season across all five arenas should remain in the 90% to 95% range for the foreseeable future. It is possible that non-prime time usage will decline as user groups seek to secure better ice time made available by an additional ice pad; however, this also creates opportunity to allocate more non-prime hours (particularly shoulder hours) to new users or existing groups seeking to rent ice time in the City.

Section 4: Strategy Development

There is considerable evidence to suggest that the location and size/design of recreation facilities impacts service, convenience and performance. The decisions regarding location and design are as important as the decision to develop a facility. To assist the City of North Bay with its arena provision/renewal strategy, this section examines best practices relating to facility provision.

Note: This exercise does not involve the evaluation of specific sites, though it is intended to assist the City in this analysis.

4.1 Guiding Principles – 2013 MURF Study

The following Guiding Principles were established in the 2013 MURF Study to guide the City of North Bay's future decision-making relating to major indoor recreation facilities. They remain relevant and should be considered as the City embarks on its next phase of arena investment.

1. Build a healthy community and foster active lifestyles.
2. Provide inclusive and accessible recreational opportunities for all North Bay residents.
3. Encourage facility designs that encourage multi-use and multi-generational activities.
4. Ensure that recreation facilities are welcoming, modern and responsive to true needs, as well as attractive to visitors.
5. Support sport tourism opportunities, but not at the expense of meeting local needs.
6. Foster and support partnerships that strengthen connections and leverage resources.
7. Make decisions that are financially responsible and affordable for the City and its residents.
8. Be strategic – this may require flexibility, a phased approach and a longer-term perspective.

4.2 Facility Location Considerations

As a starting point, the ideal site should have sufficient space for a multi-pad arena (stand-alone single pad arenas were not supported in the 2013 MURF Study or this 2019 Update) and associated parking. The site should be connected to (or capable of being connected to) municipal services, with relatively flat grades. Larger sites are preferred over smaller sites so that in future years, additional construction (such as the replacement of the aging Pete Palangio rinks and/or other recreational uses) could be phased in to expand the complex to support future growth.

It is noted that, by way of a special project committee, the previous City Council undertook a site location search for a new arena facility.

The following criteria are commonly used to guide site selection exercises for major recreation facilities and may be useful in informing the City's decision-making. Depending on the nature of the evaluation, the City may choose to identify mandatory criteria and/or apply weights to various criteria to denote their importance.

- a) Proximity to Population

- b) Accessibility by Road (major street)
- c) Accessibility by Transit and Active Transportation Routes
- d) Site Suitability (size and shape) and Visibility
- e) Site Development Costs
- f) Compatibility with Surrounding Uses
- g) Ownership
- h) Zoning and Development Approvals
- i) Opportunity Cost and Operational Efficiency
- j) Distance from Comparable Facilities
- k) Potential for Expansion
- l) Ability to Generate Synergies with Other Indoor and Outdoor Amenities, including Sport Tourism

Beyond specific site characteristics, there are several qualitative considerations that may contribute to the success of one location over another. The importance of the following considerations will depend on the objectives established for the facility, as well as the proposed facility components, uses and markets.

1. The site should enhance accessibility for those in need and strengthen the community

Equity, physical accessibility, and convenience are key considerations to ensuring that the facility is well utilized. This includes ensuring that the location is accessible by public transit and active transportation choices (e.g., walking, biking, etc.), and that it has suitable parking options for users that choose to drive. If the facility is to include services beyond those traditionally provided in arenas, the City may also wish to prioritize access for disadvantaged populations that may have unique barriers in accessing services (e.g., low income, youth, etc.).

2. The site should support strategic investment opportunities and offer valued-added benefits

The City is encouraged to consider sites that offer value-added benefits to the community. This may include (but is not limited to):

- prominent and visible locations that offer potential for facility expansion
- community pride and promoting the City's quality of life;
- conference and trade show potential;
- outdoor spaces and connected public realm for extended activity and program opportunities
- partnerships that maximize public access, affordability and service
- alignment with the objectives and outcomes of other civic projects / campus locations
- timeliness (e.g., sites that can be readily developed in-line with community needs)

An assessment of these factors would require a site-specific evaluation.

3. The site should have user group and wide community support

A City-wide lens should be applied to the site evaluation as the proposed facility will serve a City-wide market and beyond. The project's objectives and recommendations may be used to guide site selection and facility design, but these are decisions that need to be made with the benefit of public and stakeholder engagement. Ultimately, the provision strategy and location need to make sense for those living nearby, users and taxpayers. This includes (but is not limited to) sites that have compatible surrounding land uses, locations that have the potential to be a community focal point, and designs that

fit with the surrounding neighbourhood. Research and public input beyond the scope of this report are necessary to ensure that these matters are adequately addressed.

4.3 Facility Size and Design Considerations

As the City plans to invest in arena and recreational infrastructure, it is important to develop a strategic approach that is aligned with community priorities. As supported by the guiding principles, one of the objectives should be to design facilities that provide appealing spaces, features and amenities and that respond to a broad range of activities. As described below, multi-pad arenas and multi-purpose facilities are typically better able to meet community and individual needs and the City's overall objectives than single-pad arenas and single-use facilities.

1. Multi-pad arenas and multi-use facilities can be transformational

Multi-use and multi-pad facilities represent a significant monetary investment. In addition to enhanced service levels, these facilities can have a transformational impact on a streetscape, neighbourhood, community and City. When done right, they can help to address broader economic, health and social outcomes ranging from sport tourism to community revitalization and beyond.

Investment in recreation facilities should be part of a larger vision for the City as this can provide significant benefits to the local quality of life and economic success. Quality recreation opportunities are known to be key factors that attract and retain residents and business.

2. Multi-pad arenas and multi-use facilities are more efficient and provide value for money

On a per square foot basis, larger facilities and multi-pad arenas are typically more cost efficient to build and operate than single pad arenas due to economies of scale. This impact is magnified when one larger facility is compared against two smaller ones as the larger single facility offers superior efficiency in use of land/space and staffing.

Operationally, multi-use and multi-pad facilities allow for efficient use of resources for facility operation as the staffing complement between a twin pad and a single pad is very similar; support spaces (reception, lobby, parking, etc.) are also maximized in larger facilities. Modern facilities are also more energy efficient and require less short-term maintenance.

3. Multi-pad arenas and multi-use facilities can serve more people and serve as community destinations

The effectiveness of any recreation facility is highly dependent on its location, design, offerings and management. Multi-use and multi-pad facilities offer a critical mass and vibrancy that attracts users at a higher rate. As "one-stop shopping" destinations that respond to a broad range of users, their usage is greater than the sum of the parts. Facilities with spaces and activities that generate usage throughout all hours of the day tend to attract the greatest number of users and can serve as important community destinations.

Conversely, smaller facilities and single pad arenas tend to be more intimate, allowing for strong local connections. As most are not as well utilized as larger facilities, local solutions are often sought to maximize utilization and develop neighbourhood-centric programming.

4. Multi-pad arenas and multi-use facilities attract tournaments and events

Multi-pad arenas and multiuse facilities are better positioned to attract and host events and tournaments, which can boost tourism and enhance local program and sport development. Residents can take pride in their recreational facilities as they invite groups from afar to visit North Bay and make use of first-class facilities.

With many other municipalities in the province having recently invested in new and expanded facilities, there is substantial competition for sport tourism, economic development and growth. Sustainable, functional and attractive recreational facilities would help to position the City to maximize its potential.

5. Multi-pad arenas and multi-use facilities are better equipped to serve all ages and abilities

Multi-use facilities allow for a wide variety of spaces and activities that respond to a broader range of residents, as well as greater potential for barrier-free spaces and quality public spaces. For example, ice organizations are seeking space for dryland training to supplement their on-ice program and for pregame warm-up – gymnasiums, dry/turf pads, fitness rooms and multi-use activity spaces allow for this.

Through their inclusive and intergenerational spaces, larger facilities allow for cross-programming, allowing for multiple family members to participate at one time (e.g., skating, walking the track, drop-in activities, programs, etc.). A lack of free time is a persistent barrier to participation and multi-use facilities are an effective mitigating measure as they offer multiple opportunities for people of all ages (often simultaneously, which is a key benefit for families that are time-pressed).

6. Multi-pad arenas and multi-use facilities can support longer operating hours

Due to their higher utilization rates and economies of scale – combined with the desire to maximize the municipality’s investment – the hours of multi-pad and multi-use facilities are often longer than those in smaller facilities. Week-long and year-round usage is more common, with hours extending to midnight in some arenas. Extended hours help to respond to the desire for self-scheduled recreation and for those that are seeking hours beyond prime-time. With irregular employment hours becoming commonplace, multi-use facilities can help to address the “lack of time” barrier.

7. Multi-pad arenas and multi-use facilities offer more opportunities for year-round use

Presently, most older arenas are used for approximately six months of the year and sit vacant for the summer months as they were not designed for warm-weather use. Some – like Memorial Gardens – are used for events or dry floor activities, or extend the ice season into spring or fall. The City’s current arenas do not have associated spaces that can support substantial recreation or community programming.

Arenas directly serve a minority of the City’s residents, though the number rises when family members and spectators are included. Like all public facilities, arenas have the potential to provide access to a broader range of recreational and community activities that can be enjoyed by people of all ages, abilities and interests. The role that these facilities play in the community can be amplified through various upgrades, programs, events and neighbourhood involvement, making them true multi-purpose facilities. Opportunities to enhance community use of arenas throughout the year, as well as multi-pad arenas co-located with other recreation spaces should be promoted.

Most municipalities are designing new arenas as multi-pad facilities combined with other spaces – such as gymnasiums, pools, indoor turf fields, activity rooms, etc. This has become the standard in Canadian municipalities and is one that should be considered for North Bay as it plans its arena replacement

strategy. By combining a variety of uses and maximizing potential year-round, the City has an opportunity to make their next major recreation facility a unique complex in Northern Ontario.

8. Multi-pad arenas and multi-use facilities allow for co-located services and partnerships

Larger facilities create a critical mass that can also enhance the attractiveness of private sponsorships, concessions/retail sales and leased commercial spaces, offering opportunities to improve revenues streams if desired. They are also appealing to social services and agencies, such as child care, public libraries, newcomer services, and other governmental and non-profit agencies, encouraging them to co-locate under one roof to serve the needs of the community.

9. Multi-pad arenas and multi-use facilities are more flexible and responsive to changing trends

The City's existing arenas are largely single-purpose facilities, with some offering meeting spaces – they are not truly multi-use. The extra space afforded by larger facilities translates into improved flexibility for changes season-to-season and year-to-year as trends and programming needs evolve. Combined with the application of contemporary standards and thoughtful design, this increases the facility's relevance and longevity. From an arena perspective, flexible multi-purpose spaces are highly desirable for dry-land training, tournament support and meetings. The most common amenities that users typically request for flexible spaces include storage, durable flooring, kitchen access, wall mirrors and expansion potential.

10. Multi-pad arenas and multi-use facilities promote physical activity, social wellbeing and inclusion

Communities are increasingly placing a priority on robust, highly functional public spaces that are fully accessible. The Accessibility for Ontarians with Disabilities Act, 2005 (AODA) requires that municipalities remove physical barriers within municipal facilities by 2025, particularly with respect to entrances, elevators, washrooms, etc.). In January 2019, Council approved barrier free updates to the washrooms at Memorial Gardens Arena.

Modern recreation facilities contain multiple high-capacity components, large public space lobbies, well lit spaces with access to natural light, energy efficient systems and access to outdoor spaces. These amenities help to maximize the user experience. The provision of common areas and casual use spaces such as walking/running tracks also helps to increase visits during non-peak hours as residents use the facility to meet friends or as part of their daily routine; the City has experienced this through the walking route that encircles the ice pad at Memorial Gardens Arena.

These benefits extend beyond recreation and sport to outcomes involving community engagement, social connections and personal health, wellness and physical activity for all residents. Multi-use facilities also attract a more diverse customer base, fostering understanding, awareness, connectedness and reduced isolation – these are key objectives of the City's Healthy Active Living Strategy.

As older adults and seniors become healthier and fitter, existing facilities will struggle to meet the programming needs of everyone within this age group. The diversity and multiplicity offered by larger multi-use facilities creates an excitement and vibrancy that is not normally achieved in single purpose facilities.

Section 5: Moving Forward

The following simplified steps, presented generally in sequential order, are offered for the City's consideration in moving this project forward.

1. PROVISION DECISION

Due to the state of the West Ferris Arena, it is understood that there is a desire to expedite this process. It is likely that the City will look to replace this facility at another location as the current site is not adequate to support a modern arena building. If the City concurs with the findings of this study – that there is sufficient demand for a fifth ice pad – it will look to build a twin pad arena to address immediate needs. This approach should be confirmed by the City.

Note: A decision relating to investment in or replacement of Pete Palangio Arena may also be required in the short to mid-term due to its age and limitations. In addition, options for spaces such as indoor turf, gymnasiums, seniors' space and/or leasable space may also be considered if there is a desire to "think beyond the rink" and create a multi-use facility.

We recommend that the City take the longview in making a decision regarding new arena facilities as they will serve North Bay and area for the next 40+ years. Consideration of not just what is needed today, but what is appropriate for the future (including other community facilities beyond arenas) is the foundation of proper planning.

2. SITE SELECTION & PRELIMINARY PLANNING

We would advise the City to closely examine potential sites in terms of their feasibility for accommodating the proposed facility. The location criteria identified in this report may be used as a starting point. A multi-pad arena is the recommended approach to achieve efficiencies in construction and operation, as well as sport tourism opportunities. Following site selection, the preliminary concept plans and cost estimates should be updated to reflect the chosen location.

3. DETAILED FINANCIAL PLAN

A financial plan for capital construction should be prepared for the selected site, with consideration of fundraising, infrastructure funding by senior levels of government and partnerships, in addition to municipal contributions. Putting this plan into action in a short time will require strong support from Council, including the allocation of sufficient capital funding.

Note: City Council recently budgeted an upset limit of \$30 million dollars in the 2019 Capital Budget towards the construction of a new twin pad. The City estimates that the cost to operate a twin pad arena (excluding principal and interest) will be similar to the cost to operate West Ferris Arena due to operating efficiencies associated with multi-pad arenas.

Note: Many large-scale municipal infrastructure projects across Ontario are currently delayed due to the uncertainty of senior government grants. Should the City advance the project to a 'shovel-ready' position then wait to pursue grants, it will be in a queue with many other projects, with few guarantees.

4. DESIGN & CONSTRUCTION

Staff are recommending a traditional Design-Bid-Build approach.

5. COMPLETION

Ideally, the opening of the new twin pad arena will coincide with the closure of West Ferris Arena. Should this not be feasible, the City should work with user groups and organizations to identify and develop contingency plans.