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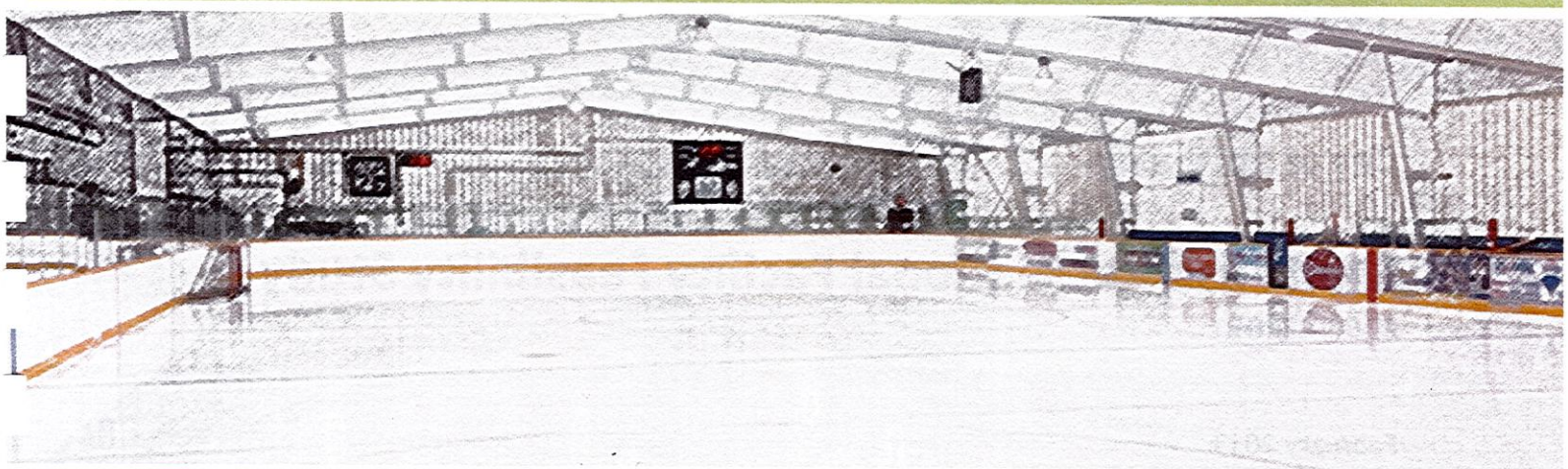
## CITY OF NORTH BAY
# Multi-use Recreational Facility Feasibility Study
FEBRUARY 2013

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City of North Bay

# Multi-use Recreational Facility Feasibility Study

**FINAL REPORT**

February 2013

**Financial Contributions provided by:**

North Bay Partners in Hockey
FedNor

**Prepared by:**

Monteith+Brown planning consultants

The JF Group

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# Acknowledgements

We would like to thank all of those who contributed to the development of the Multi-use Recreational Facility Feasibility Study. This document is a product of the vision and dedication of the Project Advisory Committee, as well as City of North Bay Council and staff. We also extend our thanks to the many community groups and North Bay residents who provided input into the Study.

The City of North Bay is also thankful for the financial contributions from North Bay Partners in Hockey and FedNor, which helped to make this project possible.

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**LIMITATIONS**

*This report was prepared by Monteith Brown Planning Consultants Ltd., The JF Group, Evans Bertrand Hill Wheeler, and Anrep Krieg Desilets Gravelle Ltd. (herein referred to as "the Consulting Team") for the account of the City of North Bay. The material in this report reflects the Consulting Team's best judgment in light of the information available to it at the time of preparation. Any use which a third party makes of this report, or any reliance on or decisions to be made based on it, are the responsibility of such third parties. The Consulting Team accepts no responsibility for damages, if any, suffered by a third party as a result of decisions made or actions based on this report.*

# Section 1: Introduction

## 1.1 Study Purpose

This Multi-Use Recreational Facility (MURF) Feasibility Study assesses the need for and feasibility of renovating, replacing, and/or constructing indoor recreation facilities in the City of North Bay.

Specifically, this report considers current and future demand for arena facilities, as well as potential improvements to Memorial Gardens Arena, Pete Palangio Arena, and West Ferris Community Centre & Arena. In addition, the demand for other facilities, such as indoor turf facilities, walking/jogging tracks, and other multi-use spaces is also assessed. Based upon the needs assessment, this Study identifies and evaluates various implementation strategies capable of meeting short and long-term needs, including renovating existing facilities, expanding existing facilities, and constructing new facilities (in this order).

As part of the analysis of options, this Study includes a business plan that examines costs (capital and operating), partnership and funding opportunities, and an implementation framework identifying key steps following the Study's completion. This process involved the careful review of factors relating to demand, usage, pricing, staffing and operations, facility components and sizing, quality of construction, and site capabilities.

Preparation of this Feasibility Study involved substantial consultation with North Bay community groups and residents through a combination of household surveys, interviews, workshops, and public open houses/meetings. Effective community consultation was essential to identifying the true needs of North Bay residents and assessing the responsiveness of various options, as well as creating a Study that is locally-responsive.

## 1.2 General Context

*Note: In November 2012, near the end of the study process, it was announced that an OHL hockey team (North Bay Battalion) would begin play in the City of North Bay for the 2013/14 season. A draft of this report was presented to the community for feedback just prior to this announcement. Key sections of this report have been updated to reflect this recent development; however, it recognized that the full impact of the North Bay Battalion on community arena demand will need to be planned for and addressed by the City of North Bay. Regardless, the options and directions contained in this report remain sound and are reflective of a comprehensive assessment of local needs and long-term strategies to address them.*

There are three arena facilities in North Bay (totalling four ice pads), as well as rinks in surrounding communities that are used by City user groups. The City's existing arena infrastructure is aging, increasingly antiquated, and generally in need of re-investment. Some limitations include a lack of accessibility, under-sized ice surfaces, and a general need for modernization. Structurally and mechanically, the City's arenas are in generally good condition for facilities of their age; however, all three facilities are nearing or beyond a "typical arena lifespan" and are not comparable to newer facilities in other communities. This can result in greater maintenance costs year after year, a decreasingly likelihood of attracting sport tourism events, and declining local satisfaction.

Local ice users have been looking forward to this Study for some time due to changes in participation, a reliance on ice time at arenas in surrounding communities, and the conditions of the City's aging arenas. Although initially driven by ice interests, the scope of the project has been expanded to include indoor multi-use recreational components, such as indoor turf facilities, walking/jogging tracks, and other multi-use spaces. In response to significant organized community interest, there is a desire to assess other complementary uses that could assist the City in meeting its sport tourism objectives, meet other community needs, leverage partnerships, and improve overall financial performance.

## 1.3 Study Process

Preparation of this Feasibility Study was divided into three phases:

Phase 1 – Research & Consultation

- identification of trends in community demographics, sport participation, facility design, and facility utilization
- extensive community input and stakeholder consultation, including:
    - public awareness program, including online information and feedback links
    - a random sample household telephone survey assess the needs and priorities of the average taxpayer, including willingness to pay for infrastructure improvements
    - interviews with key community stakeholders and City Staff
    - user group questionnaires and workshops with community organizations
    - a public open house to gather community input
- examination of the condition and design of existing arenas
- development of guiding principles and core objectives for future facility provision

Phase 2 – Needs Assessment & Option Development

- assessment of existing facilities, including their ability to meet current and future user needs
- identification of current and future indoor recreation facility needs
- an analysis of sport tourism opportunities
- preparation of facility provision options and high level concept plans

Phase 3 – Feasibility & Implementation

- review of funding sources and partnership possibilities
- development of business plan (capital and operating costs)
- identification of user fee impacts
- development of an implementation plan to achieve the Study's objectives
- a public information session to present the draft options to the community

For this project, an Advisory Committee (MURFAC) has been struck 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. Combined with input from City Council, other stakeholders, and the general public, this Advisory Committee has assisted in defining an appropriate work plan for the study, providing key information for the assessment, and providing feedback on deliverables.

# Section 2: Planning Context

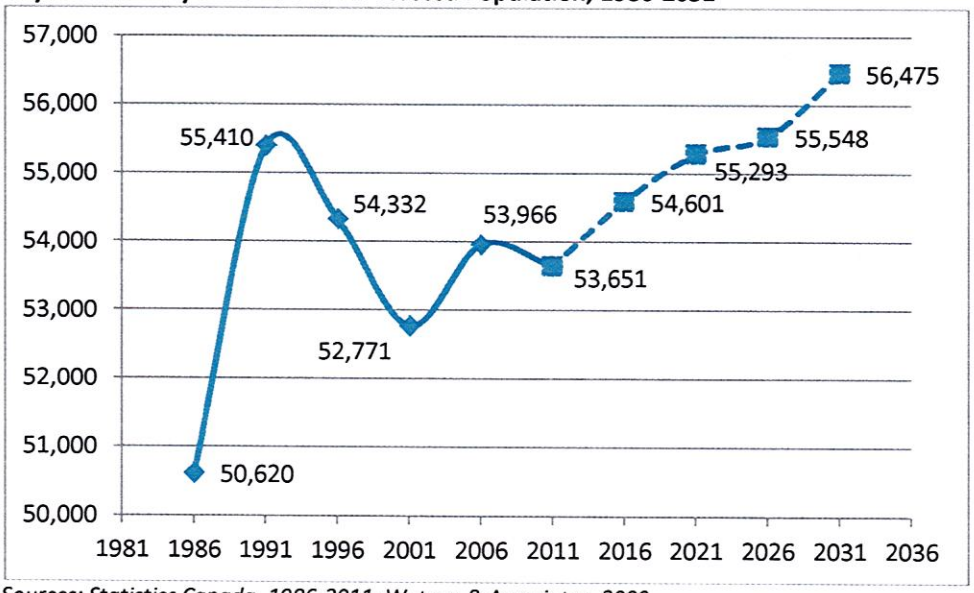
## 2.1 Community Profile

### Historic and Forecasted Population

The City of North Bay has seen both the growth and decline of its population in the last twenty-five years, as seen in the following figure. The City experienced significant growth between 1986 and 1991, followed by a period of decline from 1991 to 2001, before rising again in 2006. In 2011, the Canadian Census reported North Bay's population to be 53,651 people, a 0.6% decrease from the 2006 Census.

The City's most recent population projection, prepared in 2009, forecasted a trend of modest population growth from 2011 to 2036, as seen in the following figure. The forecast estimates that the City's population will grow to 56,475 people by 2031. Much of North Bay's future growth is expected to occur through subdivision development in the northwest portion of the City and through infill and intensification opportunities throughout the urban area.

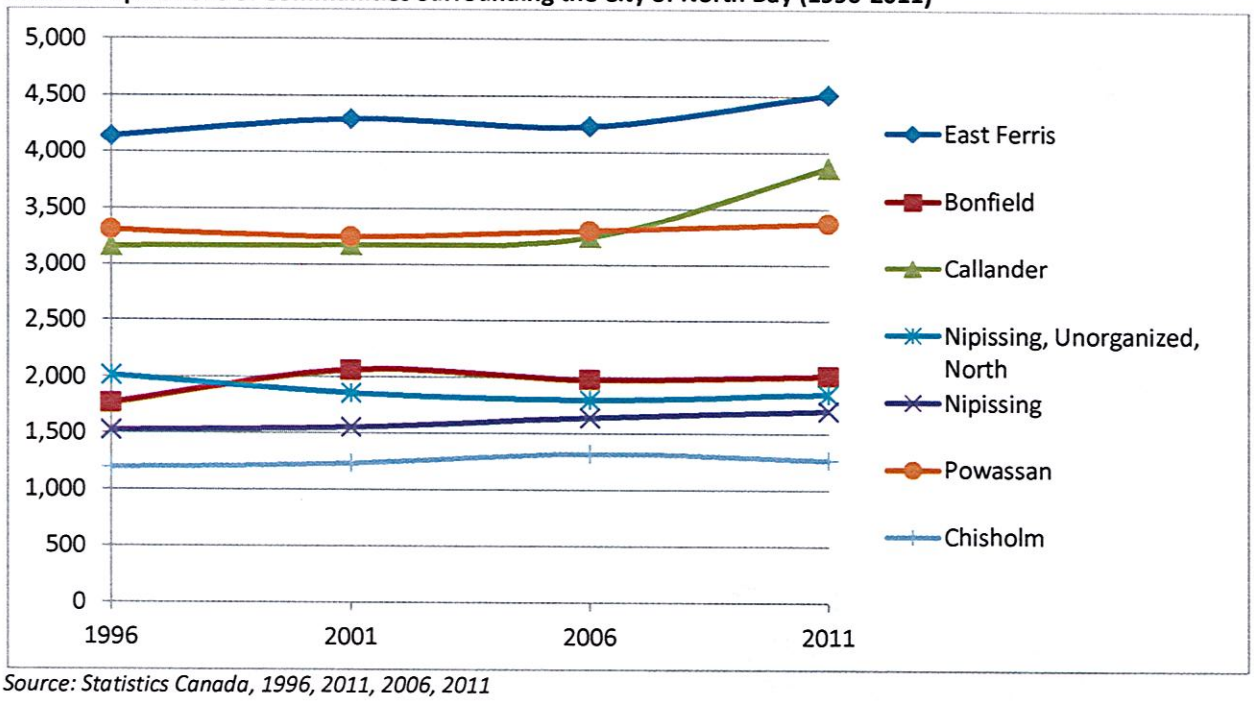
**City of North Bay Historic and Forecasted Population; 1986-2031**



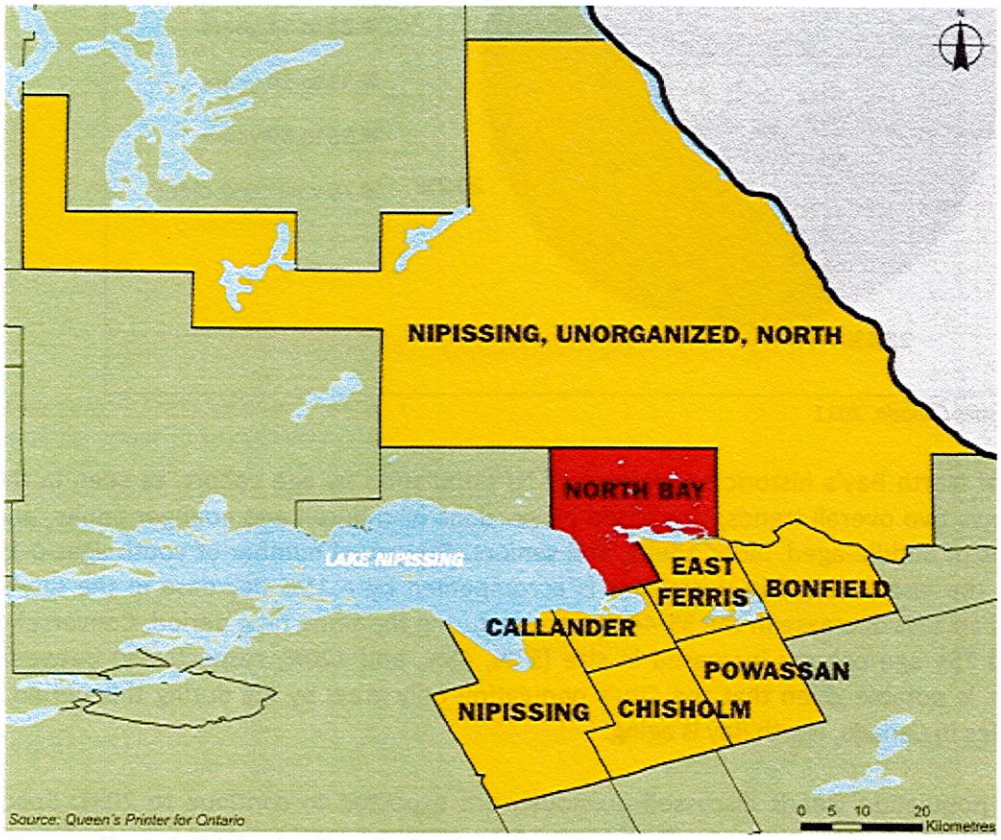

*Sources: Statistics Canada, 1986-2011; Watson & Associates, 2009*

A comparison of the communities surrounding North Bay reveals moderate population growth. The historic population growth in surrounding communities – East Ferris, Bonfield, Callander, Nipissing, Nipissing Unorganized (North), Powassan, and Chisholm – for 1996-2011 can be seen in the following figure. In 2011, the total population for these seven municipalities was 18,590. Since 1996, the number of residents in these collective communities has grown by 9%, compared to a 1% decrease in the City of North Bay's population.

**Historic Populations of Communities Surrounding the City of North Bay (1996-2011)**




*Source: Statistics Canada, 1996, 2011, 2006, 2011*



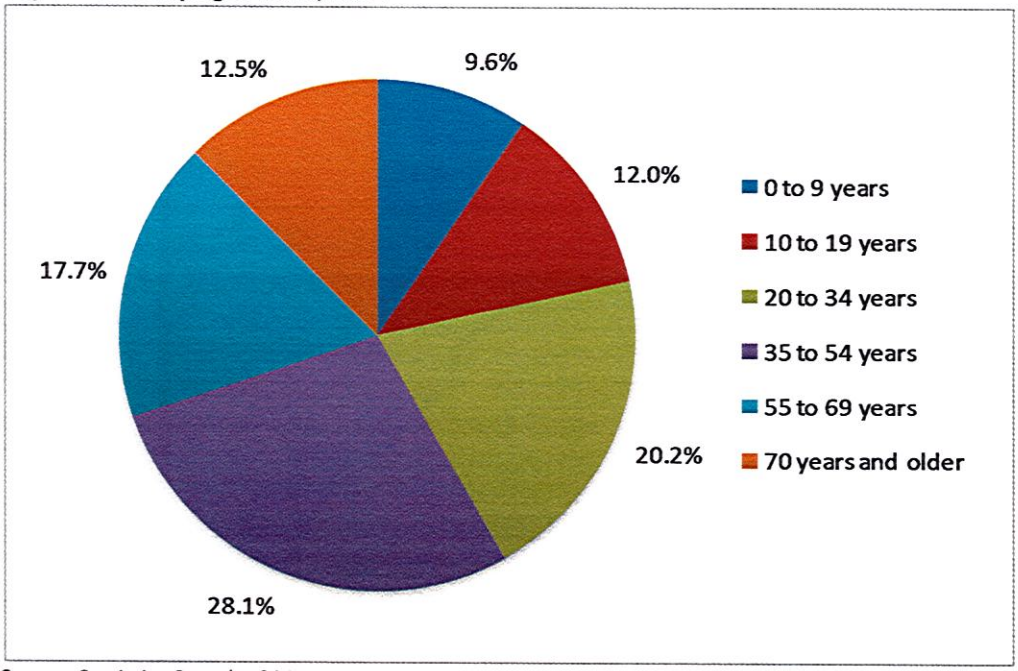

Source: Queen's Printer for Ontario; Statistics Canada

## Age Profile

The age profile of a community is an important indicator of its recreational demands, and offers guidance to the types of facilities that should be offered. For example, a community with a high proportion of children and youth may have higher demand for competitive sports such as hockey or soccer, while a community with a higher proportion of older adults may require facilities that offer less intensive forms of exercise.

The City's age profile in 2011 is seen in the following figure. Compared to the Province, North Bay has a greater percentage of residents ages 20 to 29 and 50+, and a lower percentage of residents between the ages of 0 to 19 and 30 to 49. The City's 2011 median age was 42.1 years, which is higher than the provincial median of 40.4 years.

**City of North Bay Age Profile, 2011**



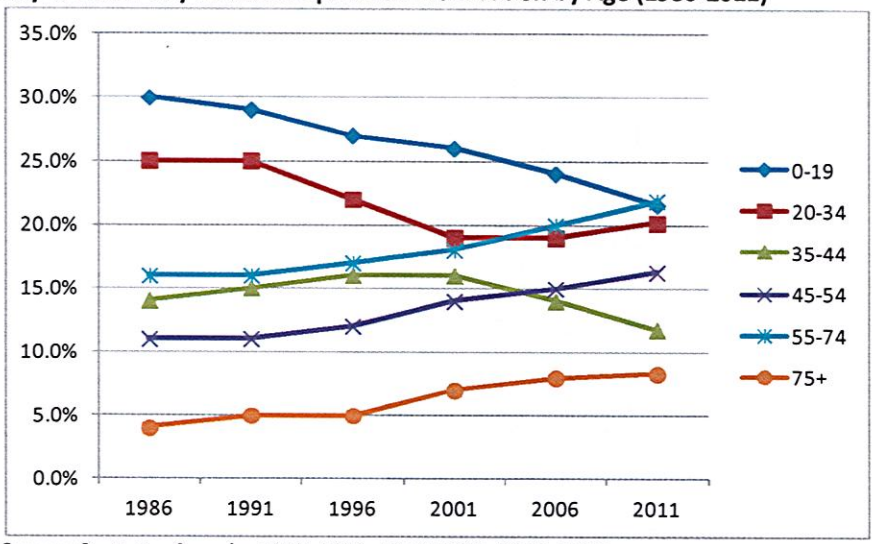

*Source: Statistics Canada, 2011*

A review of North Bay's historic breakdown of its population by age cohort, as seen in the following figure, shows two overall trends; decreased proportions of children and younger adults, and increased proportions of middle-aged, older adults, and seniors. The actual number of youth ages 0-19 has fallen by 24% in the last twenty-five years; this is accompanied by a 15% decrease in the City's 20-34 age cohort and an 11% decrease in the 35-44 age group during the same time period. Conversely, the 45-54, 55-74, and 75+ age cohorts increased in size (57%, 45%, and 120%, respectively) between 1986 and 2011. This is notable given that the City's population only grew by 6% during this period. Like most communities in Canada, North Bay is aging.

The City's population trends discussed previously are expected to continue to 2031. Specifically, the number of children and youth ages 0 to 19 are forecasted to continue to decline before returning to near current levels, for an overall decrease of 1.5% between 2011 and 2031; this is consistent with the school boards' projections for declining enrolment. Larger reductions are forecasted for the 20 to 34 and 45 to 54 age groups (14% and 21%, respectively). During this same time period, the number of

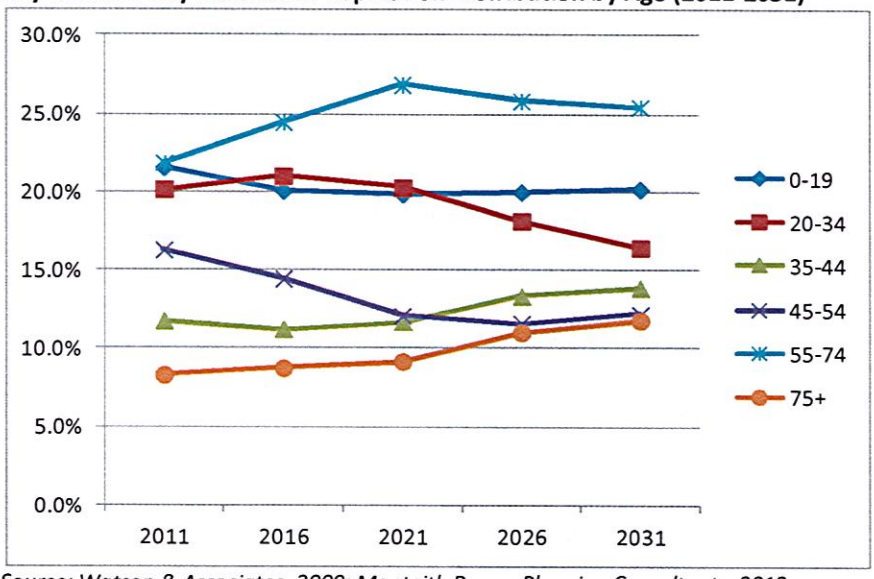
older adults and seniors (age 55+) is expected to increase by 30%. The following figures and table includes age-specific population forecasts for the City based upon a cohort survival projection model.

**City of North Bay Historic Population Distribution by Age (1986-2011)**




*Source: Statistics Canada, 1986, 1991, 1996, 2001, 2006, 2011*

**City of North Bay Forecasted Population Distribution by Age (2011-2031)**




*Source: Watson & Associates, 2009; Monteith Brown Planning Consultants, 2012*

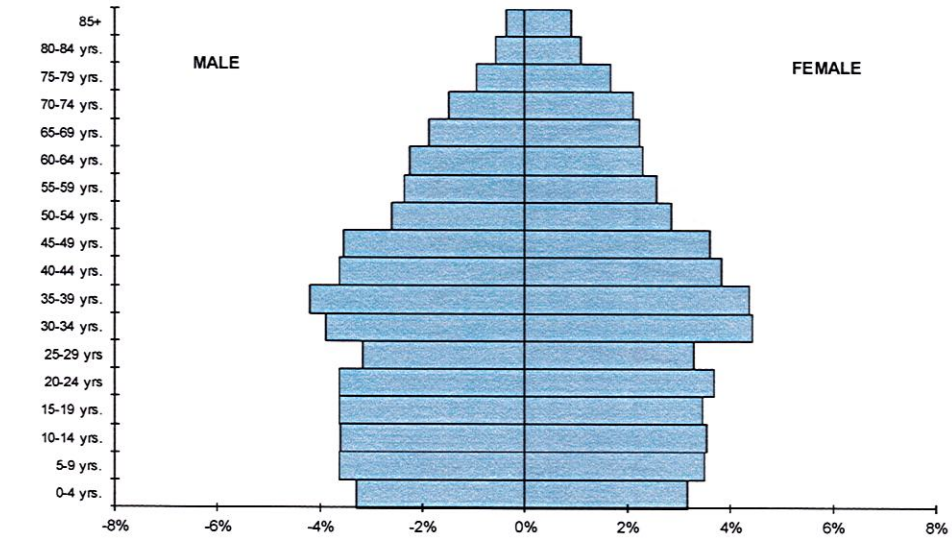
**City of North Bay Population Forecast by Age Cohort (2011-2031)**

| Age Group | 2011 (actual) | 2031 (projection) | Difference (2011-2031) | |
|---|---|---|---|---|
| **0-19** | 11,580 | 11,407 | -173 | -1.5% |
| **20-34** | 10,815 | 9,287 | -1,528 | -14.1% |
| **35-54** | 15,060 | 14,740 | -320 | -2.1% |
| **55+** | 16,205 | 21,041 | 4,836 | 29.8% |
| **Total** | **53,650** | **56,475** | **2,825** | **5.3%** |

*Source: Statistics Canada, 2011; Watson & Associates, 2009; Monteith Brown Planning Consultants, 2012*

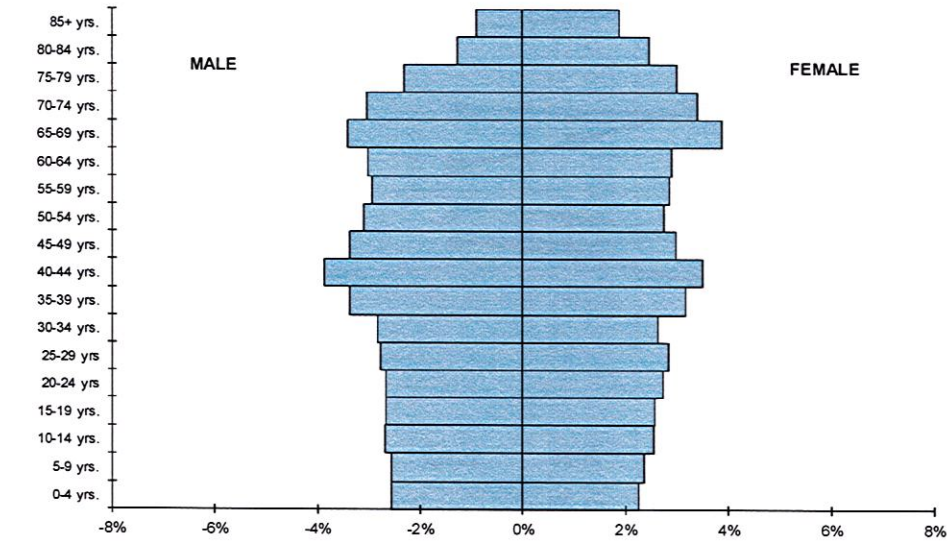
The following population pyramids – for the years 2011 (actual) and 2031 (projected) also illustrate the aging of the population and "narrowing of the pyramid".

**Age-Sex Distribution, City of North Bay, 2011**




Source: Statistics Canada, 2011

**Projected Age-Sex Distribution, City of North Bay, 2031**




Source: Monteith Brown Planning Consultants, 2012

As discussed earlier, the City's age profile has implications on the delivery of recreation and leisure services in North Bay. Typically, the baby boom generation is more interested in participating in recreation and leisure activities than were previous generations of seniors. This 'new senior' is more likely to continue participation in active forms of recreation, although at a gentler pace than younger cohorts. A decreasing proportion of youth and younger adults may impact the demand for certain recreation facilities and programs currently offered in the City; this correlation is explored further at the next stage of analysis.

**Income and Education**

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

As indicated by the 2006 Census, the City of North Bay's median income for all private households was $46,628, which is well below the provincial average of $60,455. In addition, the percentage of the City's population that have completed a University or College degree or diploma (37.5%) is slightly below the provincial average (38.9%); however, North Bay has a higher percentage of residents that have completed an apprenticeship or trades certificate/diploma.

As an implication of the City's income and education profile, residents may be less likely to participate in recreation activities, and may be less willing to pay higher user fees for recreation services.

**Immigration & Diversity**

Participation in and accessibility of recreation opportunities is often impacted by immigration and diversity levels. According to Statistics Canada, in 2006, 1.4% of North Bay's population immigrated to Canada between 1991 and 2006, which is lower than the provincial average of 12.6%. As of 2006, 6% of the City's population was comprised of immigrants (i.e., born outside of Canada), which is much lower than the provincial average of 28%. As the vast majority (94%) 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.

**Physical Activity, Sport and Recreation**[1]

In 2011, approximately 59.1% of the population of the North Bay Parry Sound District Health Unit (NBPSDHU), which stretches from Parry Sound along Georgian Bay to north of North Bay, were identified as 'moderately active' or 'active' in leisure-time physical activity, which is higher than the provincial average of 50.5%. This data is provided by Statistics Canada and is not available for the City of North Bay alone.

Despite this finding, the NBPSDHU has identified a higher prevalence of adults who are overweight or obese than the Ontario average. In 2003, 57.0% of the Health Unit's population reported to be overweight or obese; this grew to 66.7% of the population in 2009 and currently sits at 62.5% of the population in 2011, which is much higher than the provincial average of 52.0% of the population.

In addition, the Health Unit area has a higher reporting rate of people with pain or discomfort that prevents participation in physical activities. Overall the percentage of the population that reported pain or discomfort has been falling from 18.4% in 2007 to 16.4% in 2009 to 16.7% in 2011 (which is higher than the provincial average of 13.5%).

[1] Statistics Canada. 2011. Health Profile. Statistics Canada Catalogue No. 82-228-XWE. Ottawa. Released October 25, 2011. http://www12.statcan.gc.ca/health-sante/82-228/index.cfm?Lang=E
North Bay Parry Sound District Health Unit. (2011). Community Picture Report. Healthy Communities Partnership.

While the area served by the Health Unit has higher reported physical activity levels, the population also has greater indications of chronic health issues that can be improved through physical activity. These trends underscore the importance of promoting year-round recreation opportunities for all ages and abilities in North Bay.

## 2.2 General Trends & Best Practices

Understanding current trends can assist with anticipating shifts in the demand for recreational facility and program requirements. The following trends – based on local, provincial, national research – may be directly or indirectly related to the potential demand, usage, and design, and operation of arena and multi-use recreational facilities in the City of North Bay. Local implications of these trends are discussed in greater detail in **Section 5: Facility Needs Assessment**.

| Recreational Participation Trends | |
|---|---|
| **Connection recreation to improved health** | ➢ The Healthy Communities movement recognizes that recreation and leisure are vital contributors to social and personal health<br>➢ More and more, municipalities are focusing on strategies to improve the activity levels, health and well-being of their residents (in 2007, the City of North Bay prepared a "*Recreation, Sport and Healthy Active Living Strategy*") |
| **Aging population** | ➢ Not unlike most Ontario cities, the number of older adults and seniors (age 55+) in the City is forecasted to increase by 53% between 2006 and 2031, while the rest of the population will shrink by 20% (see Section 2.1)<br>➢ 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<br>➢ There is a growing need for accessible facilities providing new program choices for older adults and seniors' (e.g., pickleball, zumba gold, etc.) |
| **Increased inactivity and obesity** | ➢ The proportion of obese children increased threefold between 1981 and 2006 across Canada[2]<br>➢ Less than half of all Canadian children are active enough to achieve optimal growth and development; adults have similar percentages<br>➢ Reliance on automobiles (s opposed to walking or biking) has created a culture of physical inactivity, while "screen time" in front of TVs, computers and video game consoles, etc. further exacerbate sedentary behaviours driving; the seasonal nature of outdoor activities also impacts activity levels |

[2] Health Canada and the Public Health Agency of Canada. (2006). It's Your Health.

| Recreational Participation Trends | |
|---|---|
| **Lack of free time** | ➢ The primary barrier to recreational participation for both youth and adults is a lack of free time<br>➢ As a result, activities that people can do on their own time (e.g., self-scheduled and drop-in programs) are growing in popularity<br>➢ Times at which programs and drop-in opportunities are offered may need to reflect longer work days, options, and limited leisure time<br>➢ Multi-purpose facilities provide opportunities for families to participate in different activities concurrently (one-stop shopping) |
| **Self-scheduled, unstructured activities are becoming more popular** | ➢ Due to busy lifestyles across all age groups (and affordability factors), there is a growing emphasis on spontaneous, non-programmed activities<br>➢ Participation in many organized sports may decline as the population ages; approximately 50% of children and 28% of adults participate directly in sport in Canada and these figures have declined in recent decades[3] |
| **Personal finances under pressure** | ➢ Income remains a significant barrier to participation in recreation activities, particularly higher cost organized sports<br>➢ Financial assistance programs (e.g., Kidsport North Bay) and low-to-no-cost programming options can help alleviate the financial burden of participation<br>➢ Despite a growing economic gap in household incomes, many municipalities are moving closer to cost recovery levels in the recreation sector due to rising capital and operating costs |
| **Overcoming challenges for persons with disabilities** | ➢ Physical, attitudinal, communicational and policy/practice barriers can deter persons with disabilities from participating in recreation<br>➢ The AODA Customer Service Standard ensures that persons with disabilities are treated with respect and in a way that enables participation<br>➢ Legislation and local policies are encouraging facility upgrades focused on improving physical accessibility (e.g., entrances, elevators, washrooms, etc.) |

[3] Ministry of Industry. (2008). Culture, Tourism and the Centre for Education Statistics research papers: Sport Participation in Canada, 2005.

| Recreational Participation Trends | |
|---|---|
| **Ice Sport Participation** | ➢ Registration in Hockey Canada (both in Ontario and Canada) has declined for two straight seasons (peaking in 2008-2009)[4]<br>➢ Across the nation, the most recent gains in hockey participation have largely been a result of girls' hockey<br>➢ 9% of Canadian children and youth play hockey, which is half the percentage that played 20 years ago[5]<br>➢ Many arena users are increasingly reluctant to utilize hours on the edges (or shoulders) of prime time; thus, scheduling groups in the early evening and late night hours is becoming more difficult<br>*Note: Additional ice sport participation trends can be found in Section 3.* |
| **Field Sport Participation** | ➢ Despite soccer's enormous growth in the last two decades in Ontario, enrolment in outdoor soccer peaked in 2007 and has seen small declines each year since<br>➢ Registration in Soccer NorthEastern (Districts of Nipissing and Renfrew) has grown by about 6% over the last six years (greater than the rate of population growth) – much of this growth is attributed to adult soccer leagues (many of whom grew up playing soccer in the 1990s and 2000s)<br>➢ Participation in indoor soccer (driven by increased emphasis on year-round training and competition) is growing across Ontario, but is largely dependent on the availability, quality, and cost of appropriate facilities (often indoor turf facilities); compared to many other areas, there is a significantly lower proportion of youth playing indoor soccer in the Soccer NorthEastern district<br>➢ Football is a sport with cyclical popularity, which may be gaining popularity again in Ontario, particularly for players from 7 to 19 years of age<br>➢ Ultimate Frisbee is also an emerging field sport with excellent growth potential, especially for adults in the 20-39 age bracket<br>*Note: Additional soccer participation trends can be found in Section 3.* |

[4] 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/sports/hockey/2011/10/31/18902646.html
[5] Ibid.

| Facility Design Trends | |
|---|---|
| **Multi-use facilities** | ➢ Most users (and families in particular) prefer multi-use facilities over single-use facilities because they offer greater synergies (e.g., cross-programming) and act as 'community hubs'<br>➢ Multi-use facilities are often designed with flexible spaces that can accommodate a wider variety of activities, along with the potential to expand (the City of North Bay only provides meeting spaces at its arenas; these facilities are not truly multi-use)<br>➢ Operationally, multi-use facilities allow for efficient use of resources for facility operation economies of scale; single use facilities are normally not as cost effective and not as responsive to community needs and expectations<br>➢ Similarly, multi-pad arena facilities are more operationally efficient than single pad arenas and can better accommodate tournaments and competitions |
| **Aging infrastructure** | ➢ The majority of Ontario's recreational infrastructure was built in the 1960s and 1970s; most of these facilities have rising maintenance costs and are not barrier-free, too small, not responsive to current needs, and nearing the end of their useful life<br>➢ Recent Federal and Provincial funding programs contributed millions of dollars toward the renewal and construction of recreational infrastructure<br>➢ Examples of adaptive re-uses of ice arenas seen in other communities include storage for public works vehicles and equipment, indoor tennis, indoor soccer, indoor cricket, box lacrosse, etc. |
| **Green construction** | ➢ Retrofitted and newly constructed facilities are not only barrier-free, but often LEED certified, which can result in increased capital costs, but somewhat lower operating costs over the long-term (as well as reducing the environmental footprint) |
| **Flexible spaces** | ➢ Multi-use facilities are often designed with flexible spaces and potential to expand<br>➢ Allows for a wide variety of active and passive activities |
| **Rising costs** | ➢ With increasing costs for petroleum-based products (e.g., steel) and other materials, the cost to build new facilities is rising at a rapid pace<br>➢ Older facilities are not as energy efficient and require greater maintenance<br>➢ Partnerships with community and/or outside interests are often sought in order to share costs and risks |

## 2.3 Benefits of Recreation

Individuals, households, and entire communities all benefit greatly from access to quality leisure services. Examples include:

- Physical benefits (health and wellness) from participation in active endeavours;
- Intellectual benefits from access to information resources and lifelong learning opportunities;
- Social benefits from opportunities to be engaged in meaningful community activities;
- Environmental benefits from the protection of open spaces; and
- Economic benefits made possible through the attraction of sport tourism and new residents due to the high quality of life that leisure services provide.

The Canadian Parks and Recreation Association and Ontario Ministry of Culture have produced summary documents of research findings that highlight the benefits of providing parks, recreation, culture, and library services. These benefits are identified below (adapted).

***Essential to Personal Health***

- Combats diabetes, heart disease, cancer and respiratory illnesses
- Prevents site specific cancers (colon, breast and lung)
- Reduces stress, depression and contributes to emotional/psychological well being
- Restores physical, mental and social capacities and abilities
- Reduces levels of obesity among children and adults

***Key to Human Development***

- Strengthens social, motor, creativity and intellectual capabilities
- Develops adults to their full potential (social, intellectual, creative, physical and spiritual)
- Positively impacts child and youth development

***Essential to the Quality of Life***

- Builds self esteem and positive self image
- Enhances life satisfaction levels
- Nurtures growth, acquisition of life skills for those with a disability

***Reduces Anti-Social Behaviours***

- Reduces self-destructive behaviours and negative social activities in youth
- Provides an antidote to smoking, substance abuse, suicide and depression
- Reduces crime, particularly effective with at risk/delinquent youths
- Builds understanding between diverse cultures
- Reduces isolation, loneliness and alienation
- Exposes youth to positive role models

***Builds Families and Communities***

- Families that play together, stay together. Children and youth remain connected; couples that share interests are more likely to stay together
- Provides safe, developmental opportunities for children and youth who are unsupervised before and after school
- Produces leaders who support their communities in many ways

- Builds social skills and stimulates participation in community life
- Provides the catalyst that builds strong self-sufficient communities
- Strengthens community engagement

***Pay Now or Pay Later***

- Reduces the costs of social services, social interventions and foster care
- Reduces crime and social dysfunction – police, justice and incarceration costs
- Reduces the long-term costs of health care provision for obesity-related diseases

## 2.4 Benefits of Multi-use Recreation Facilities

Experience in hundreds of communities across Canada supports the finding that multi-use recreation facilities can provide a great number of benefits. While the specific nature and degree of these benefits will depend on local circumstances, facility design/operation, and a host of other factors, there is no denying that multi-use recreation facilities have the potential generate substantial economic, social, and environmental gains for local municipalities. These benefits are most notable in those municipalities that view sport infrastructure as an investment in the community, not simply an expenditure.

Larger multi-use facilities are more economical to build and operate than a model that relies on several stand-alone facilities; experience has shown that facilities become increasingly more expensive to operate and maintain once their systems surpass a 25-year lifespan. Multi-use facilities also serve as "one-stop shopping" destinations that respond to a broad range of users all under one roof. By becoming a "hub" within the community, facilities such as this can also offer opportunities for improved revenue generation. Multi-use facilities also have the opportunity to better facilitate and attract events and tournaments that can bring increased numbers of visitors to the community and also significantly enhance local program and sport development.

The opportunities and benefits that a new Multi-use Recreation Facility can provide to North Bay's residents are many. Residents need to know that:

- they have facilities and programs that can help them achieve the significant health benefits made possible through physical activity;
- their children can all have access to ice-related activities and teams that play in North Bay or within a reasonable driving distance;
- they have a wide variety of structured programs and unstructured activities for all age groups;
- they have a common meeting place with sufficient capacity for community activities;
- their taxes are not being wasted trying to keep old and inefficient facilities functional;
- full accessibility is not an option but rather a requirement for all programs; and
- they can take pride in their recreational facilities as they invite groups from afar to visit North Bay and participate in first-class activities and events.

It is also important to note that the City of North Bay has endorsed a Healthy Active Living Strategy. This means that the City and its partners are committed to making physical activity a part of residents' daily lives. This is achieved through various initiatives, collaborations, and proactive planning that takes into account the diverse and changing needs of the community. Appropriate investment in recreational infrastructure and corresponding program strategies will help the City move towards its goal of increasing health and physical activity levels of North Bay residents.

Ultimately, the leadership provided by City Council will decide how much and in what ways the municipality will invest in its community. 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. 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.

# Section 3: Review of Inventories and Participation Levels

This section contains an assessment of each of the City's existing arena facilities, as well as those in the regional market.

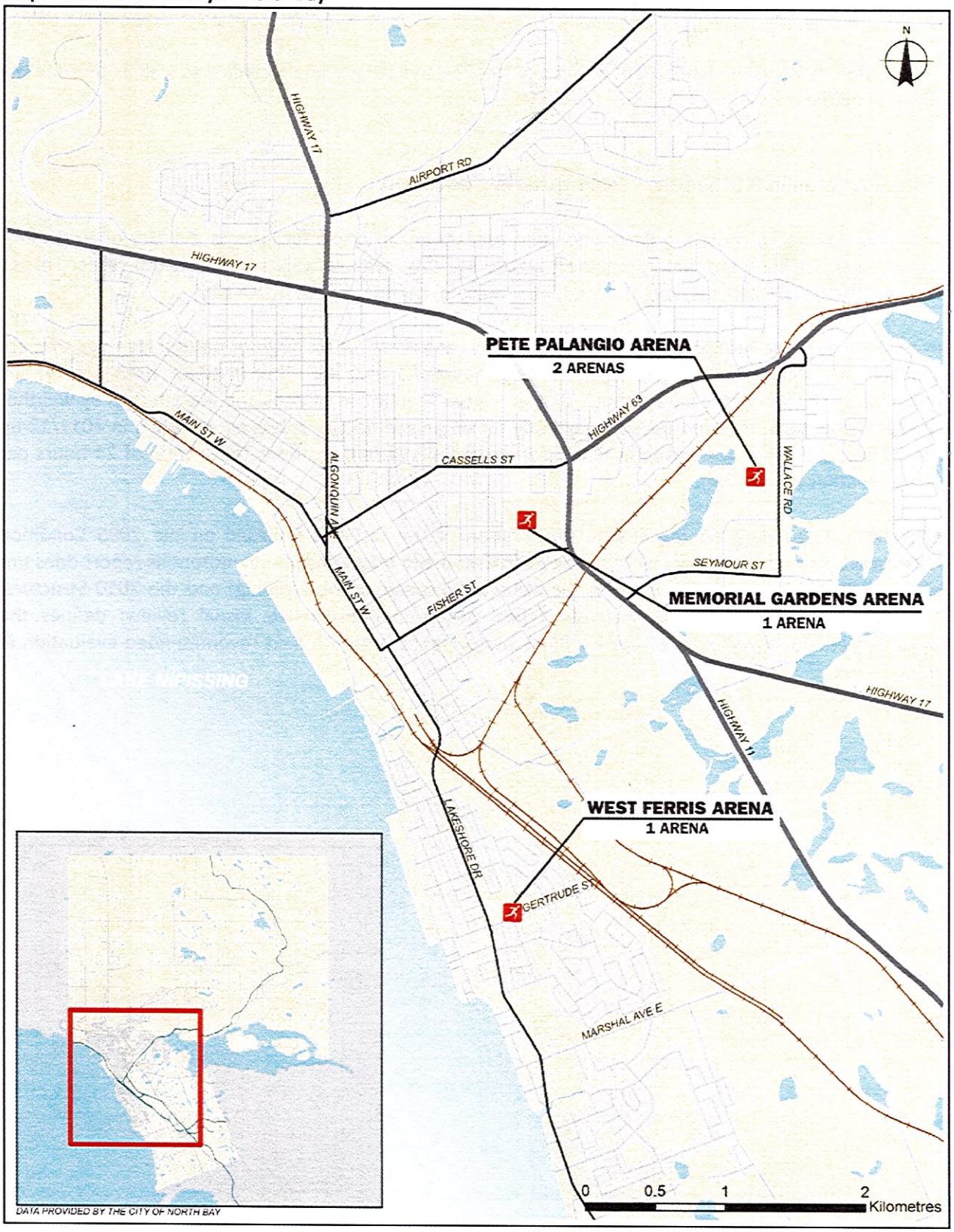
## 3.1 Arenas in North Bay – Amenities & Condition

The following pages contain a description and assessment of arena facilities in the City of North Bay. These three facilities are well distributed across the City, with locations in the south (West Ferris), central (Memorial Gardens), and eastern (Pete Palangio) portions of the urban city.

In addition to these facilities, the City also provides caretakers for six outdoor natural ice rinks that are available for shinny hockey, skating, and neighbourhood use; six other outdoor rinks are run by volunteers. Outdoor rinks have a much shorter season than indoor arenas and are affected by weather conditions; as such, they are used infrequently for organized hockey practices, although in 2011/12 up to 12 hours per week was made available for ice permits at two locations (for a total of 24 hours per week, weather permitting).

Information presented on the structural condition of the facilities is based on the 2005 Condition Assessment Reports (prepared by The Stonewell Group and Jp2g Consultants; note: this report does not have much detail and/or expertise on the structural aspects of the building) and the 2010 Structural Integrity Reports (prepared by Halcrow Yolles; notes: non-destructive, visual review; defines the structural adequacy in terms of the buildings performance until the next recommended evaluation in 2015).

**Map of Arenas in the City of North Bay**



## Memorial Gardens Arena

Constructed in 1955, Memorial Gardens (100 Chippewa Street) is the largest single pad arena within the City of North Bay (54,229 square feet of total building area). Several additions and modifications have been made to this facility over the years, including to dressing rooms, washrooms, roof, and parking lot (paving). This facility is used for large group events and the higher caliber of hockey is playing in this arena. In 2007 when North Bay was awarded the Kraft Hockeyville title, Memorial Gardens hosted an NHL exhibition game. The Gardens hosted the North Bay Centennials OHL hockey team from 1982 until 2002. For the 2013/14 season, Memorial Gardens will host the City's new OHL team (the Battallion) and the Nipissing Lakers, in addition to community users.

**Memorial Gardens Arena & Site**


Arena amenities include:

- 90 x 190 foot ice surface
- Building capacity (occupancy) of 4,048, including fixed seating (3,582) and standing room
- Box office
- North Bay Sports Hall of Fame (60 person capacity) with small kitchen and bar; ramp access
- Super Suite (60 person capacity) located on second floor above the Sports Hall of Fame; no elevator access
- Suspended scoreclock
- Media gondola
- 5 concession locations (contracted out)
- 5 community dressing rooms
- 2 dedicated dressing rooms for junior and varsity teams
- Accessible washroom facilities
- Parking lot for approximately 400 vehicles (shared with YMCA and Thompson Park)

Based on visual observation and consultation with staff and arena users, the following represent the most frequently mentioned issues or complaints about Memorial Gardens Arena (in no particular order):

- Ice pad is undersized and not ideal for competitive play (NHL regulation size is 85 x 200 feet, leaving Memorial Gardens about 10 feet short of the preferred dimension)
- Lacks modern amenities (seating, suites, ice size, etc.) that could make it more attractive for elite level play
- Wooden seats are old and uncomfortable for spectators
- Lack of air conditioning limits summer use, especially for conferences and special events
- Lack of dehumidification equipment requires year-round use of boilers (energy inefficient) to mitigate fog and condensation buildup
- Desire for more dressing rooms
- Two dressing rooms are very small and have vertical clearance issues
- Lacking sufficient storage
- Super Suite lacks elevator access

In terms of the arena's construction, the facility was built with cast in place concrete foundations founded on rock. The arena has a steel superstructure with steel columns, long span girder trusses, open web steel joists or steel beam purlins and wood deck. Additions have been added out different sides at different stages which, in majority, are single storey with load bearing masonry block walls supporting open web steel joists and steel roof deck.

The 2005 Condition Assessment report indicates no structural concerns, but did identify common life cycle replacement requirements, the most notable of which was parking lot paving and roof repairs, both of which have since been completed; other longer-term considerations include installation of a dehumidification system and roof insulation, replacement of the boilers, and replacement of the concrete slab (the latter is in the City's forecast for 2018). The 2010 Structural Integrity Report indicated the structure to be in good condition. This report found that steel roof members were showing paint flaking and light surface rust and roof members should be cleaned and painted.

Staff have indicated that the arena's mechanical equipment is in good condition as a result of recent investments and continued upkeep. However, at present Memorial Gardens does not have any dedicated dehumidification equipment, requiring the steam boilers to remain online year-round to prevent fog and condensation. As identified in the 2005 Condition Assessment, the arrangement is less energy efficient than using dedicated natural gas, ducted, dehumidification equipment.

Note: The agreement between the Battalion and the City of North Bay will result in $12 million in renovations to Memorial Gardens Arena in 2013. These renovations include capital upgrades that were already planned over the next 10 years, but have been fast tracked as a result of the agreement. Other community users will benefit from these upgrades, which include: NHL regulation size ice pad; new seating; accessibility improvements (e.g., elevator); dehumidification; and concert and conference compatibility.

**Pete Palangio Arena**

Located at 603 Wallace Road and previously known as "Doublerinks Arena", this facility was built in 1974 by a private operator. In 1977, the facility was sold to the City of North Bay for $1 million. This twin pad arena was renamed the Pete Palangio Arena in 1987 in honor of a North Bay native and NHL hockey player: Mr. Peter Palangio. Inside of the arena each of the rink surfaces have been named in honor of two additional North Bay natives and previous NHL players: Pep Kelly and Ab Demarco. The total building area of the arena is listed at 42,000 square feet.

**Pete Palangio Arena & Site**


Arena amenities include:

- Two 80 x 180 foot ice surfaces
- Main floor boardroom (30 person capacity)
- Elevator (attendant operated) access between the main level and the second floor mezzanine
- 12 dressing rooms on a lower level (14 steps, no elevator access)
- Concession within the front lobby (contracted service)
- Enclosed viewing area between the two ice pads
- Bench seating in each rink – approximately 150 person capacity per rink
- Skate shop on second level
- Asphalt parking lot at front of property (capacity of approximately 200 vehicles)
- Accessible washrooms on ground level and second level
- Accessible (ramped) entrance, but no power-assisted automatic door
- Mechanical equipment and administrative offices at front of building

In 2010, the City shut down the lower level dressing rooms for two months due to high mould levels. Mould abatement and remediation work was completed, including new wall coverings, bench replacement, and repainting.

Based on visual observation and consultation with staff and arena users, the following represent the most frequently mentioned issues or complaints about Pete Palangio Arena (in no particular order):

- Dressing rooms are on the lower level and have no elevator access; the basement has had previous issues with mould due to water seepage and condensation (humidity controls are now in place)
- Dressing rooms lack sufficient shower facilities (one per room)
- Ice surfaces are small and not regulation size
- Arena is showing its age (design was a product of the time)
- Lacking a first aid room
- Lacking sufficient storage
- Viewing area offers poor sightlines

In terms of the arena's construction, the facility is enclosed in a prefabricated steel bent type building. The rinks are slab on grade and no basement. The prefabs are connected with a centre link running the length of the rinks. The connector has a basement with slab on grade, the ground floor is constructed on load bearing masonry block walls and is precast concrete floor slabs, the roof construction of the link is steel beams connected to the prefab columns of each prefab with an open web steel joist and a steel roof deck. In front of the prefabs is a one storey amenity area without basement constructed of load bearing masonry walls and open web steel joists and steel roof deck.

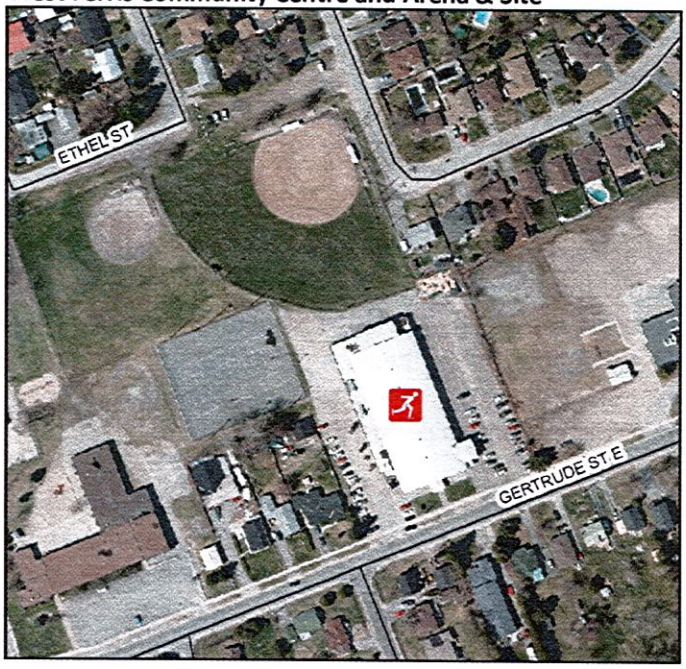
The 2005 Condition Assessment report does not indicate any structural concerns, but did identify common life cycle replacement requirements, the most notable of which was a new concrete slab around the year 2023 (the existing slab was poured around 1985 when a new brine piping and headers were installed). The 2010 Structural Integrity Report indicates some light surface rusting of the steel super-structure requiring cleaning and painting, as well as some cracking of load bearing and non-load bearing walls (it was recommended that vertical control joints be cut in load bearing walls). In general, the assessment indicates that the building is in good condition and should perform normally over the evaluation period (to 2015).

Staff have indicated that the arena's mechanical equipment is in good condition as a result of recent investments and continued upkeep. As part of the ongoing rehabilitation program, the City's capital budget has a dehumidification investment planned for the change rooms in 2012/13, with additional upgrades to other components scheduled for future years.

## West Ferris Community Centre and Arena

West Ferris Community Centre and Arena (42 Gertrude Street) was built as part of the "centennial" celebration in 1967. This arena is a single pad ice surface with an upstairs community hall, for a total building area of 32,748 square feet. An addition built in 1995 has allowed for a total of three minor sport organizations to set up office operations in the building. Subsequent enhancements have included washroom and mechanical upgrades. Proclaimed as the "Home of Ringette", this arena functions as a community centre for this area of the City. The facility is part of the larger Sam Jacks Complex that consists of the community centre/arena, tennis courts, and a baseball field.

**West Ferris Community Centre and Arena & Site**




Arena amenities include:

- 80 x 180 foot ice surface
- 5 dressing rooms
- Spectator capacity of approximately 700 (bench seating and lobby)
- Main floor boardroom (30 person capacity)
- Concession (contracted out) and skate sharpening room (currently vacant) in the front lobby
- Elevator (attendant operated) access to the second floor, which includes
    - Community hall (approximately 1800sf) and kitchen
    - Community group offices
- Accessible washrooms on ground level and second level
- Paved and gravel parking lots (80 vehicles)
- Mechanical equipment at front of building (external entrance)

Based on visual observation and consultation with staff and arena users, the following represent the most frequently mentioned issues or complaints about West Ferris Community Centre and Arena (in no particular order):

- Showers and washrooms are shared between some dressing rooms
- Dressing rooms housed along a long, narrow and unappealing corridor
- Upstairs auditorium extends over ice surface for about two to three feet, which can affect game play
- Ice surface is small and not regulation size (largely affects use by older teens and adults)
- Interior water damage caused by snow and ice loading on the roof (being addressed through roof redesign project in 2012)
- Lack of warm seating (e.g., in lobby)

In terms of the arena's construction, the structure consists of timber columns supporting long span heavy timber bowstring trusses supporting wood joists and roof deck. The front amenity area is two storeys with a hall on the second floor constructed of heavy glue laminated timbers and wood framing. The side change room addition consists of load bearing masonry walls with steel beams and open web steel joists and steel roof deck. The rear zamboni addition is two-storeys with no basement, constructed of load bearing masonry walls and steel columns supporting steel beams and open web steel joists with steel floor deck with concrete for second floor and a steel roof deck on the roof.

The 2005 Condition Assessment report does not indicate any structural concerns, but did identify common life cycle replacement requirements, the most notable of which was a replacement of the barrel (rounded) roof in 2019 and a new concrete slab around the year 2023 (the latter is in the City's forecast for 2015). The 2010 Structural Integrity Report indicated problems with checking of bottom chord splices of the heavy timber trusses and that they needed to be banded, a process that was completed in 2011. The structural framing is in good condition and is expected to perform normally over the evaluation period (to 2015).

This is a 42 year old heavy timber wood building with long span bowstring trusses with bolted connections that have seen checking and repairs. This timber structure has 9 long span trusses over the arena; if one fails it will pull a good portion of the structure down. Wood is prone to rot when subjected to the wrong environment and/or conditions and is sometimes not easily detected if it is located in a concealed joint, inside the core of a member, near bearing zones etc. This building will require continued structural inspections and repair/maintenance.

Staff have indicated that the arena's mechanical equipment is in good condition as a result of recent investments and continued upkeep. As part of the ongoing rehabilitation program, the City's capital budget has a roof redesign project scheduled for 2012, with additional upgrades to other components scheduled for future years.

*Note: At the time of this report, discussions are ongoing regarding a proposed agreement that would see the North Bay Trappers of the NOJHL make West Ferris Arena their home rink (the team currently plays at Memorial Gardens Arena, but will be relocated as a result of the new OHL team). In the event that the Trappers move to West Ferris Arena, upgrades will likely be required to accommodate the team.*

## 3.2 Arenas in North Bay – Participation & Utilization

**For the 2011/2012 ice season, there were approximately 3,112 registered youth and adult players using the City of North Bay's rinks.** Of this amount, 1,931 are youth/special needs participants; updated data for the 2012/13 season suggests that growth in figure skating, girls' hockey, and ringette has increased this figure to 2,000 youth/special needs participants. In addition to the organized users identified below, the City also offers parent and tot programs, public skating, private rentals, and shinny. Smaller and/or more sporadic rentals also make use of a limited number of non-prime time hours.

**City of North Bay – Registered Ice Participants, 2011/12 season**

| Ice Sport Organization | Primary Market Served | Registered Participants (2011/12) |
|---|---|---|
| West Ferris Minor Hockey Association | youth | 779 |
| North Bay Figure Skating Club | youth | 277 |
| West Ferris Ringette Association | youth | 235 |
| North Bay Minor Hockey Association | youth | 200 |
| North Bay District Girls Hockey Association | youth | 280 |
| Nipissing District Athletics (High School)* | youth | 108 |
| North Stars | special needs | 35 |
| North Bay Sledge Hockey | special needs | 17 |
| North Bay Trappers (Jr. A) | competitive | 20 |
| North Bay Trappers (Midget) | competitive | 20 |
| Nipissing Varsity Hockey Team (Mens) | competitive | 25 |
| Canadore College Varsity Hockey Team | competitive | 16 |
| North Bay Mercantile League | adults | 240 |
| North Bay Oldtimers* | adults | 90 |
| Nipissing Intramural Hockey* | adults | 140 |
| Canadore College Intramural Hockey | adults | 150 |
| Casual Rentals in Prime-time / late night* | adults | 480 |
| **TOTAL** | | **3,112** |

** Estimated; includes CFB league*

There are two interesting observations from this data:

1) **The local <u>youth capture rate</u> in ice sports is approximately 22%** (based on 1,931 youth / special needs participants and the City's listed 2011 population for ages 4-18 of 8,813). 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).

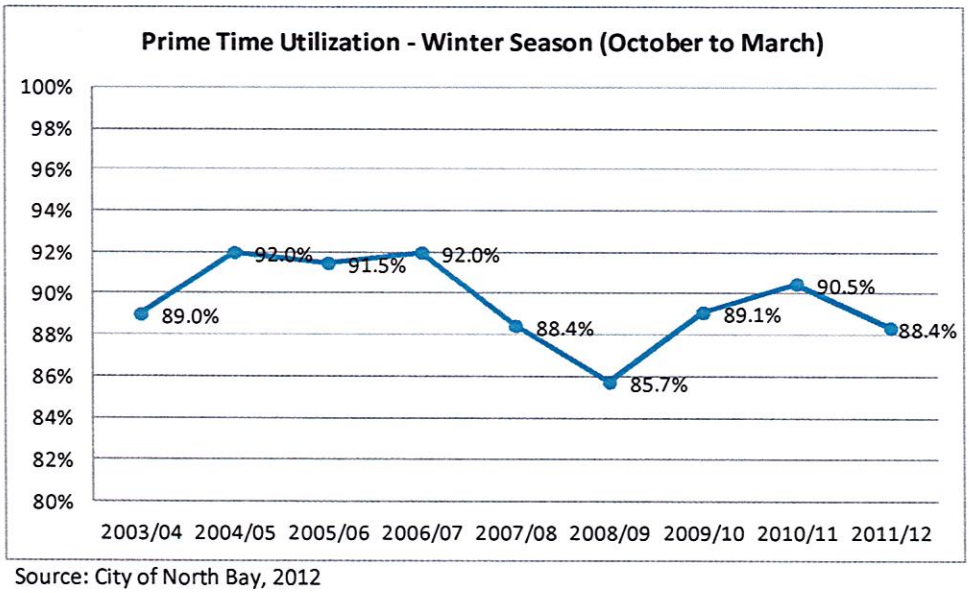
2) **The local <u>adult capture rate</u> in ice sports is approximately 4%** (based on 1,181 adult and competitive participants and the City's listed 2011 population for ages 19-54 of 31,570). This rate is also in-line with most other communities (which average about 4%, meaning that 1 out of every 25 adults play ice sports). Typically, the ratio of youth to adult players within a municipal arena setting is 7:3 (or 6:4 in smaller centres); in North Bay, this ratio is closer to 6:4, which is generally consistent with a typical usage profile.

**In terms of usage, during a normal week in the winter, the City's arenas are operating near or at capacity in prime time.** Continued efforts to discourage the turning back of ice and unused booked times will help to maximize community access.

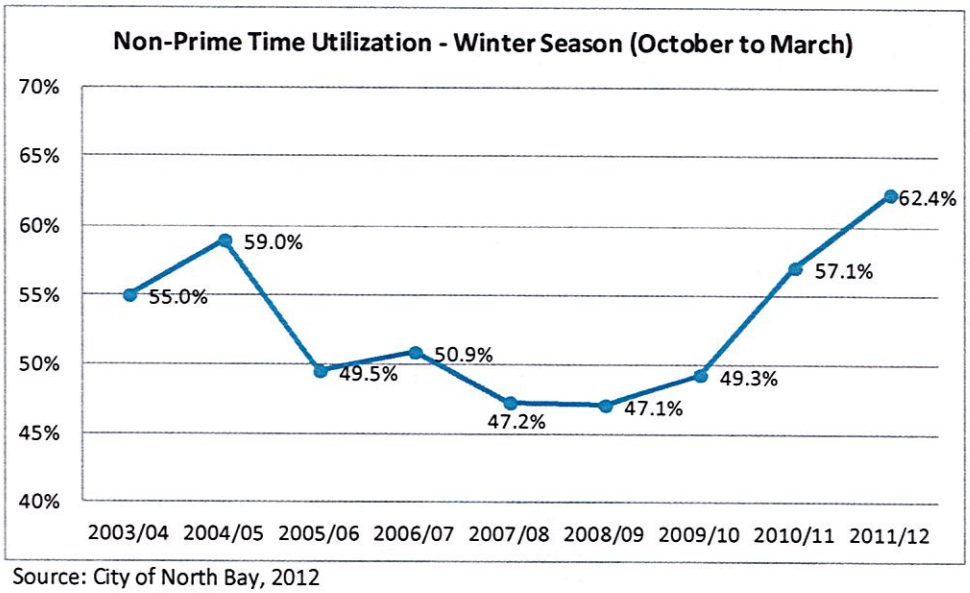
For the purposes of this study, prime time is defined as 5 pm to 10 pm from Monday to Friday inclusive, and 7 am to 10 pm on Saturday and Sunday; these are typical prime time hours (i.e., accessible to youth) used by most municipalities. This definition should not prohibit the City from charging prime time rates outside of these hours (e.g., during "shoulder hours"); for example, the City extends the prime time definition to midnight on all days. The age of younger participants often precludes them from using hours outside this range due to school or rest requirements. Historically, some communities have seen adult demand beyond these hours; however, shifting lifestyles and work pressures have reduced people's willingness to use many of these later hours. Conversely, with an aging population there is increasing demand for daytime leagues and activities for retirees.

The following text and graphs explain the City's arena usage profiles by prime and non-prime ice time:

- From October 1, 2011 to March 31, 2012, **88% of prime ice time** was booked across the four rinks. Usage typically exceeds 95% during the months of November to February. Historic data dating back to 2003/04 indicates that prime time utilization has ranged from 85% (2008/09) to 92% (2004/05 and 2006/07). Usage is very consistent between all four rinks. Due to scheduling practices (particularly year-end playdowns/playoffs), tournament allowances, and turned back ice, it is impossible to utilize 100% of the available prime time ice during this period. **Usage in the 90% range is indicative of an arena that is being used at capacity during prime time.**
- From October 1, 2011 to March 31, 2012, **62% of non-prime ice time** was booked across the four rinks (note: this includes down-time associated with ice maintenance). Historic data dating back to 2003/04 indicates that non-prime time utilization has ranged from 47% (2007/08 and 2008/09) to 62% (2011/12). **Non-prime utilization has increased for each of the past three seasons.** Memorial Gardens receives the greatest amount of non-prime time utilization; however, these recent increases have been evident at the three other rinks as well.




Source: City of North Bay, 2012




Source: City of North Bay, 2012

In terms of the summer season, depending on demand, the City typically has two ice surfaces open to accommodate summer hockey, ringette, and figure skating camps, as well as contract ice. Those arenas without summer ice are used for a number of floor sports and events, such as ball hockey, lacrosse, shows, etc. It is estimated that the North Bay Youth Ball Hockey League had over 200 youth participants and the North Bay Youth (Indoor) Lacrosse League had about 140 registrants in 2012.

To gain a better understanding of the type of groups using the arenas, the following table and graphs contain an assessment of the City's arena schedules for a typical week during the 2011/2012 winter season.

*Note: These schedules are based on pre-booked times and may differ slightly from actual usages due to turned back ice, make-up games, tournaments, or last minute bookings.*

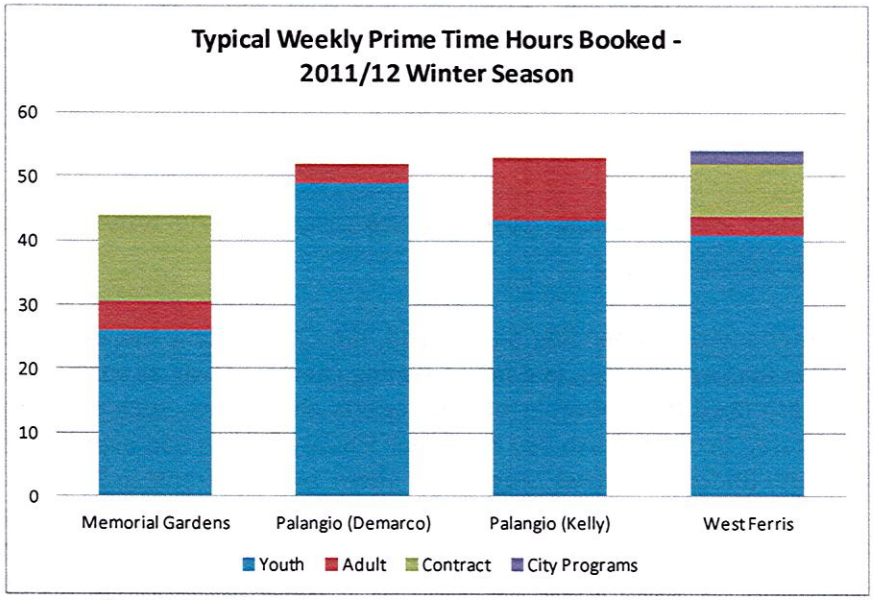
**Typical Weekly Usage – North Bay Arenas (4 ice pad), 2011/12 Winter Season**

| Group | Prime-time Hours | Non-Prime Hours | TOTAL HOURS |
|---|---|---|---|
| ***Definition*** | *M-F 5pm-10pm*<br>*S-S 7am-10pm* | *M-F 7am-5pm*<br>*M-S 10pm-12am* | |
| **Youth / Special Needs** (Minor/Girls Hockey, Ringette, Figure Skating, etc.) | 159 | 51 | **211** |
| **Adult Hockey & Casual Rentals** | 20 | 33 | **54** |
| **Contracts** (Lakers, Trappers) | 22 | 11 | **33** |
| **City Programs / Public Skating** | 2 | 20 | **22** |
| **Ice Maintenance** | 0 | 37 | **37** |
| **TOTAL HOURS USED PER WEEK** | **203** | **153** | **356** |
| **TOTAL HOURS AVAILABLE PER WEEK (4 pads)** | **220** | **256** | **--** |
| **UTILIZATION** | **92%** | **60%** | **--** |
| **AVERAGE HOURS UNUSED PER WEEK (including shoulder months of October and March)** | **17** | **103** | **--** |

Note: Totals may not add due to rounding

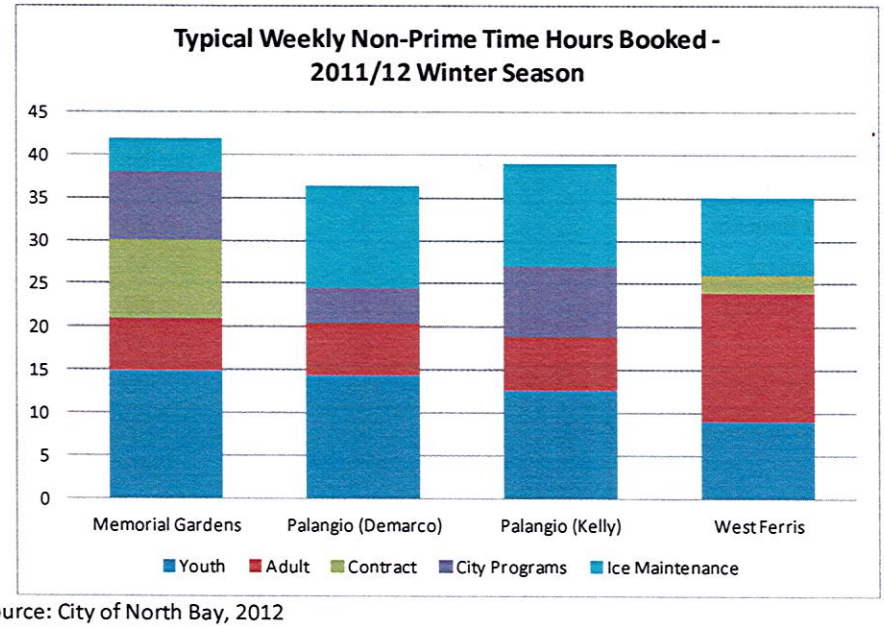
In 2011/12, youth organizations received 72% of the prime time ice allocation, followed by contracts (10%), adult groups (9%), and City programs (1%); 8% was not rented. In comparing the 2010/11 and 2011/12 seasons, the allocation to youth groups remained consistent, however, adult hockey and casual rentals declined by 10 hours per week (a 16% drop).

Youth are the dominant users at all City rinks, most notably the Palangio and West Ferris arenas. Adult usage is also highest at one of the Palangio ice pads (Kelly). Contract ice (e.g., Lakers, Trappers, etc.) is exclusive to Memorial Gardens and West Ferris arenas.




Source: City of North Bay, 2012

During non-prime hours, youth remain a dominant user (mainly special needs groups and figure skating). City programs and adults are also key users of non-prime ice time. All of the City's ice maintenance is undertaken during non-prime hours.




Source: City of North Bay, 2012

When determining ice allocations for future seasons, the City utilizes the following priority order:

1. Tournaments and events
2. Contracts
3. Competitive teams playing in leagues with out-of-town teams
4. Community programming ice for leagues and associations
5. Public skate program
6. Team practices, parties, and incidental use

While a priority listing for allocation has been established by the City, the process by which each group receives ice time (including the amount and time of day/week) is not clear. For example, this priority order does not provide a breakdown by youth or adult-serving organizations and non-profit or for-profit organizations. It would appear that ice allocation remains grounded in historic use, with requests for new programs or additional ice time being addressed on a case-by-case basis. This makes it difficult for new or growing organizations to receive suitable ice times to enable growth of their sports. This practice may also create conflict between adult and youth utilization (or even from a gender-equity perspective), particularly during periods when youth demands are increasing.

To provide greater clarity amongst existing and new arena groups around the City's ice allocation process, **it is recommended that an Ice Allocation Policy be developed**. Many communities have adopted a formal ice allocation policy that provides for a fair, equitable, and transparent process, often based on registration levels. Such a policy is not currently in place in North Bay. The City's 2000 Tourism and Leisure Long-Range Plan also supported the development of such a policy.

## 3.3 Arenas in Surrounding Communities

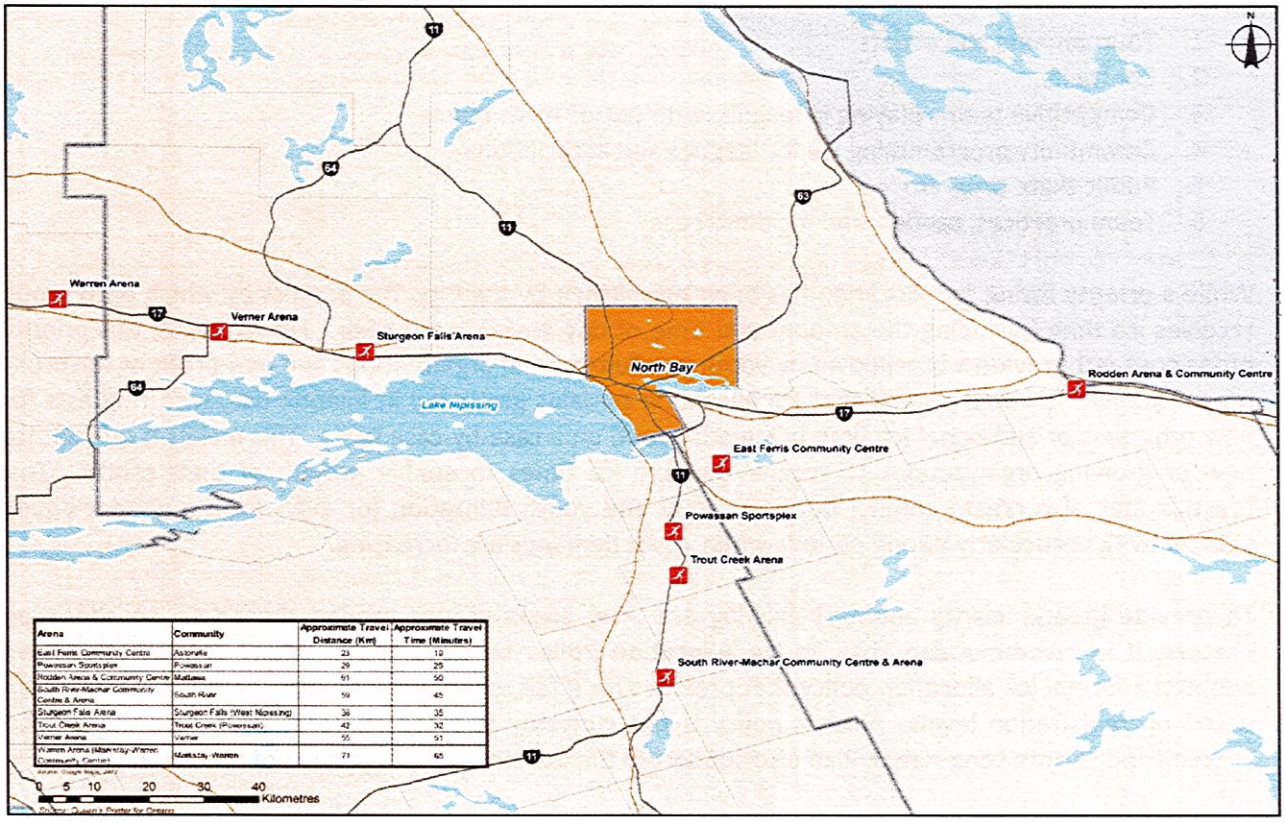
North Bay's proximity to other communities, combined with the regional nature of some facility types, leads to the willingness of some residents to travel farther distances to access certain recreational activities. The following is a snapshot of arenas in other municipalities in the area.

**Estimated Travel Time & Distance to Other Arenas**

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

Source: Google Maps (for distance)

**Map of Arenas in Surrounding Communities**




| Arena | Community | Approximate Travel Distance (Km) | Approximate Travel Time (Minutes) |
|---|---|---|---|
| East Ferris Community Centre | Astorville | 23 | 19 |
| Powassan Sportsplex | Powassan | 29 | 25 |
| Rodden Arena & Community Centre | Mattawa | 91 | 50 |
| South River-Machar Community Centre & Arena | South River | 59 | 45 |
| Sturgeon Falls Arena | Sturgeon Falls (West Nipissing) | 38 | 35 |
| Trout Creek Arena | Trout Creek (Powassan) | 42 | 32 |
| Verner Arena | Verner | 55 | 51 |
| Warren Arena (Mawhinay-Warren Community Centre) | Markstay-Warren | 71 | 65 |

**Description of Arenas in Surrounding Communities, 2011/12**

| Municipality | Facility | Description |
|---|---|---|
| **Powassan** | **Trout Creek Arena** | • Single pad arena<br>• 180' x 78'<br>• 6 dressing rooms |
| **East Ferris** | **East Ferris Community Centre** | • Single pad arena<br>• 180' x 85'<br>• 2 curling rinks (the Township puts in the ice and curling club maintains)<br>• There are now 7 change rooms in total<br>• Also contains a state of the art fitness centre, refurbished hall, a technological advanced library and a 2-pad curling rink |
| **Powassan** | **Powassan Sportsplex** | • Single pad arena<br>• 185' x 85'<br>• 7 dressing rooms<br>• Hall with kitchen (only accessible by stairs)<br>• Outdoor pool, curling club onsite |
| **West Nipissing** | **Sturgeon Falls Community Centre** | • Single pad arena<br>• 187' x 87'<br>• 6 dressing rooms<br>• Community Centre also contains pool, fitness centre, hall |

| Municipality | Facility | Description |
|---|---|---|
| **West Nipissing** | **Verner Arena** | • Single pad arena<br>• 185' x 85'<br>• 5 dressing rooms<br>• Community hall |
| **Mattawa** | **Rodden Arena** | • Single pad arena<br>• 180' x 80'<br>• 6 dressing rooms<br>• Hall with full kitchen |
| **South River-Machar** | **South River-Machar Community Centre & Arena** | • Single pad arena<br>• Small ice size (exact dimensions unavailable)<br>• 4 dressing rooms<br>• Upstairs hall with full kitchen, curling club onsite but separate building, though mutual plant (volunteer installs and maintains curling ice) |
| **Warren** | **Warren Arena** | • Single pad arena<br>• 180' x 80'<br>• 5 public dressing rooms plus 1 private room (used by Old Timers league)<br>• Community Hall, board room, Lion's Club room, and recently expanded to add a community health centre and library branch |

**Rental Rates and Utilization of Arenas in Surrounding Communities, 2011/12**

| Facility | 2011/12 Rental Rates | Utilization |
|---|---|---|
| **Trout Creek Arena** | • Prime and Non-Prime rates are $102, applicable to all users | • 100% utilization from 5pm to 11pm during the week and on Sundays<br>• Only 3-4 hours typically booked on Saturdays (approximately 8 hours available) |
| **East Ferris Community Centre** | • Prime Minor Hockey/Figure Skating: $110<br>• Prime Adult: $126<br>• Non-prime: $71 for all users | • No additional capacity between 4pm and 10pm and busy on the weekends as well<br>• Light usage prior to 4pm and after 10pm |
| **Powassan Sportsplex** | • Prime Minor Hockey/Figure Skating: $91<br>• Prime Other: $118<br>• Non-Prime: $65 | • 95% utilization 5pm to 12am during week except Tuesday (5-9:30pm); booked from 7:30am to 10:30pm on Saturday and 8:30am to 10:30pm on Sunday<br>• Daytime usage light<br>• 16-20 hrs/wk used by North Bay teams |
| **Sturgeon Falls Community Centre** | • Prime and Non-Prime rates: local minor hockey/figure skating $80, Adult $107 | • 100% utilization during weekday prime times and busy on the weekends as well<br>• Daytime usage is light |

| Facility | 2011/12 Rental Rates | Utilization |
|---|---|---|
| **Verner Arena** | • Prime and Non-Prime rates: local minor hockey/figure skating $80, Adult $107 | • 100% utilization during weekday prime times and busy on the weekends as well<br>• Daytime usage is light |
| **Rodden Arena** | • Prime Minor Hockey/Figure Skating: $45<br>• Prime Adult: $65<br>• Non-Prime: free or marginal during early day, $65 during non-prime shoulder hours depending on user group | • No additional capacity between 4pm and 11pm during the week and on Sundays<br>• 40% utilization on Saturday (approximately 8 hours available) |
| **South River-Machar Community Centre & Arena** | • Prime Youth: $83.70<br>• Prime Adult: $93<br>• Non-prime: $50 for all users | • Remaining availability is limited to about 7 hours of prime time ice per week (3 on weekday evenings and 4 on weekends)<br>• Non-prime bookings are very light |
| **Warren Arena** | • Minor Local: $70<br>• Minor Non-Resident: $83<br>• Adult Local: $86<br>• Adult Non-Resident: $92 | • 95% utilization during the week, but lighter usage on weekends (Sunday is virtually unbooked)<br>• Daytime usage is light (figure skating club folded last year) |

Note: Quoted rental rates include applicable taxes unless otherwise noted.

The supply of other arenas in the area needs to be examined to determine if there is sufficient capacity to continue to absorb a portion of local demand. As mentioned earlier, the use of outside facilities generates issues related to travel time and access. Travelling outside the community may not a sustainable solution for all North Bay residents, although this has certainly been a historic practice.

Nevertheless, it is prudent to consider the supply and potential ice availability in other communities. Interviews with the recreation departments within the local municipalities suggest that there are a number of factors – both positive and negative – that are affecting arena demand, including:

- Factors leading to decreased demand for ice:
  - aging population (and fewer children); and
  - rising costs of participation is particularly impacting surrounding communities whose resource-based economies are in a period of decline.
- Factors leading to increased demand for ice:
  - changes in minor hockey boundaries and amalgamation of centres (this increases the need for practice time, but can lead to increased demand at some arenas at the expense of others); and
  - growing interest from older adults (many are playing longer).

The communities that can be expected to have available ice time in the future are generally those that have aging populations with growth that is below replacement level.

There are no known planned arena developments in surrounding municipalities at this time, nor are there any planned closures in the regional arena supply.

Based on this assessment, ice availability in other regional arenas appears to be limited during weekday prime time hours (generally between 5pm and 10pm), though **a few arenas (Rodden, South River-Machar, and Trout Creek) have weekend availability, particularly on Saturdays. Therefore, should the City of North Bay's arenas not be able to accommodate all demand locally, teams/players have the option of travelling approximately 30 to 50 minutes for available ice time out-of-town.** Contributing to this willingness to travel is the fact that rates in outlying communities also tend to be lower than City arenas and the rental times are often more favourable.

**Summary Table – Arenas in Surrounding Communities, 2011/12**

| Arena | Year Built | Rinks | Size (feet) | Dressing Rooms | Prime Youth Rate | Prime Adult Rate | Non-Prime Rates | Prime Time Availability |
|---|---|---|---|---|---|---|---|---|
| **Trout Creek Arena** | 1972 | 1 | 180 x 78 | 6 | $102 | $102 | $102 | 8hrs Saturdays (rest of wk. full) |
| **East Ferris Community Centre** | n/a | 1 | 180 x 85 | 7 | $110 | $126 | $71 | Nearly Full (ice available after 10pm) |
| **Powassan Sportsplex** | n/a | 1 | 185 x 85 | 7 | $91 | $118 | $65 | Nearly Full |
| **Sturgeon Falls Community Centre** | 1960s (1990s reno) | 1 | 187 x 87 | 6 | $80 | $107 | $80-$107 | Nearly full |
| **Verner Arena** | 1975 | 1 | 185 x 85 | 5 | $80 | $107 | $80-$107 | Nearly full |
| **Rodden Arena** | 1956 (2011 reno) | 1 | 180 x 80 | 6 | $45 | $65 | Discre-tionary (low) | 8hrs Saturdays (rest of wk. full) |
| **South River-Machar Arena** | 1977 | 1 | n/a (small) | 4 | $83.70 | $93 | $50 | 7 hours per week |
| **Warren Arena** | 1973 | 1 | 180 x 80 | 6 | $70-$83 | $86-$92 | $70-$92 | 5-8hrs Saturdays, all day Sunday |

## 3.4 Arenas in Comparator Communities

While it is recognized that every community has a slightly different socio-demographic composition and different sport participation rates, requests are often made to understand how one community compares to others. In the case of North Bay, its comparator communities are identified in the following table (municipalities with similar-sized populations and/or northern Ontario locations were chosen).

In terms of total population per ice pad, North Bay is currently providing one rink per 13,413 residents. This rate is similar to most of the comparator communities, which are currently providing ice pads at a range of one per 10,200 (Orillia) to 18,100 (Sarnia). The City of Greater Sudbury is noted in the table but should be excluded from direct analysis due to its unique geographic distribution and potential over-supply of arenas (they are currently reviewing their arena provision and renewal requirements).

To better adjust for age-related differences in population profiles, arena provision rates for children and youth (ages 5-19) were also examined. North Bay is currently providing one ice pad for every 2,895 children and youth. This is nearly identical to the average of the other benchmarked communities.

**Market Research – Arena Provision in Comparator Communities**

| Community | 2011 Population | Ice Pads | | Population per Ice Pad (total) | Population per Ice Pad (ages 5-19 – 2011) |
|---|---|---|---|---|---|
| | | Municipal | Non-municipal | | |
| Orillia | 30,586 | 3 | 0 | 10,195 | 2,160 |
| Timmins | 43,165 | 4 | 0 | 10,791 | 2,608 |
| Belleville | 49,454 | 3 | 0 | 16,485 | 3,638 |
| **North Bay** | **53,651** | **4** | **0** | **13,413** | **2,895** |
| Sarnia | 72,366 | 4 | 0 | 18,092 | 3,866 |
| Sault Ste. Marie | 75,141 | 4 | 2 | 15,028 | 3,075 |
| Greater Sudbury | 106,840 | 16 | 0 | 6,678 | 2,217 |
| **Average (excl. North Bay)** | **62,925** | -- | -- | **10,787** | **2,927** |
| **Average (excl. North Bay & Greater Sudbury)** | **54,142** | -- | -- | **14,248** | **3,069** |

Notes:

Belleville's fourth ice pad (Memorial Arena) is currently closed and has been excluded from this count.

Sault Ste. Marie has one not-for-profit arena (Soo Pee Wee Arena), as well as Rankin Arena (located on Rankin Reserve, belonging to the Batchewana First Nation); Rankin Arena has not been counted in the per capita calculation.

Greater Sudbury is currently reviewing its arena provision and renewal requirements.

The magnitude of the recreation infrastructure deficit and potential funding responses were key topics discussed by leading industry thinkers at the *2011 Lake Louise National Recreation Summit* about the future of the recreation sector. Summit participants agreed that there are a number of inter-related asset development and funding issues that contribute to the current infrastructure challenge:

- About half of the municipally-owned sport and recreation facilities in Canada are at the end of their useful lives and need to be replaced.
- All community sport and recreation facilities that are in mid-life cycle require renovation or upgrades consistent with their age.
- Most owners of sport and recreation facilities are carrying a significant amount of deferred maintenance.
- Community facilities built before 1990 require retrofit investment to improve customer appeal or renovations to resolve building standard issues including improved accessibility and energy efficiency.
- The public's rising expectations are driving demand for more and different types of facilities built to a higher standard than ever before.
- New facilities are required to close the supplied/demand gap in the current system.
- Additional facilities will be required to meet future needs linked to population growth.

## 3.5 Soccer in North Bay – Participation & Trends

An indoor sports facility is one of the components being assessed through this Study. As this would be the first facility of its kind in North Bay, the indicators of demand are mostly indirect (e.g., outdoor rectangular sport field participation data is useful in projecting potential usage of an indoor facility).

The following table identifies the City's various soccer, football, and ultimate frisbee organizations, along with their estimated registration for the 2011 season. Outdoor soccer has an estimated 3,498 players in 2011, with ultimate frisbee and football combining for an additional 805 players. **In total, there were approximately 4,303 persons (youth and adult) playing outdoor sports (rectangular fields) in 2011; three-quarters of these players are youth.** This compares to **308 players (indoor)** registered in the Armstrong Park & Nipissing District adult indoor soccer league that plays out of post-secondary gymnasiums; there is presently no youth indoor soccer league in the City.

**City of North Bay – Registered Outdoor Rectangular Field Sport Participants, 2011 season**

| Sport Organization | Sport | Primary Market Served | Registered Participants (2011)* |
|---|---|---|---|
| North Bay Youth Soccer | soccer | youth | 2,350 |
| North Bay Select Soccer | soccer | youth | 200 |
| High School Soccer | soccer | youth/school | 360 |
| Masters Soccer | soccer | adult | 35 |
| Armstrong Park Ladies Soccer | soccer | adult | 162 |
| Nipissing Adult Ladies Soccer | soccer | adult | 91 |
| Nipissing Adult Men's Soccer | soccer | adult | 300 |
| **Subtotal – Soccer** | | | **3,498** |
| North Bay Ultimate Frisbee | ultimate | adult | 300 |
| North Bay Bulldogs - youth | football | youth | 70 |
| Nipissing Wild | football | youth | 45 |
| Nipissing District Athletics | football | youth/school | 344 |
| North Bay Bulldogs - adult | football | adult | 46 |
| **Subtotal – Other Field Sports** | | | **805** |
| **TOTAL** | | | **4,303** |

** Estimated*

With soccer representing more than 80% of registered rectangular field users, it is highly likely that this sport will be the primary user of a future indoor sports field, should one be built. To better contextualize this demand, there are several trends that can be observed from examining registration data from the Ontario Soccer Association (OSA)[6].

Soccer in Canada underwent enormous growth in the 1990s (replacing baseball and hockey as the most popular team sports among Canada's youth) and has been sustained by high registration in the past decade. The sport's popularity continues today, however, its growth appears to be slowing across the

[6] *The figures referenced in the following paragraphs include organizations affiliated with the Ontario Soccer Association, including North Bay Youth Soccer Club, North Bay Selects Soccer Club, Armstrong Park Soccer Club, and Nipissing District Adult Soccer Club. Excluded are school teams, private sports clubs, and casual players.*

province, including players in younger age cohorts. According to the OSA, enrolment in outdoor soccer activities peaked in 2007 and has seen small declines each year since. *(see chart on following page)*

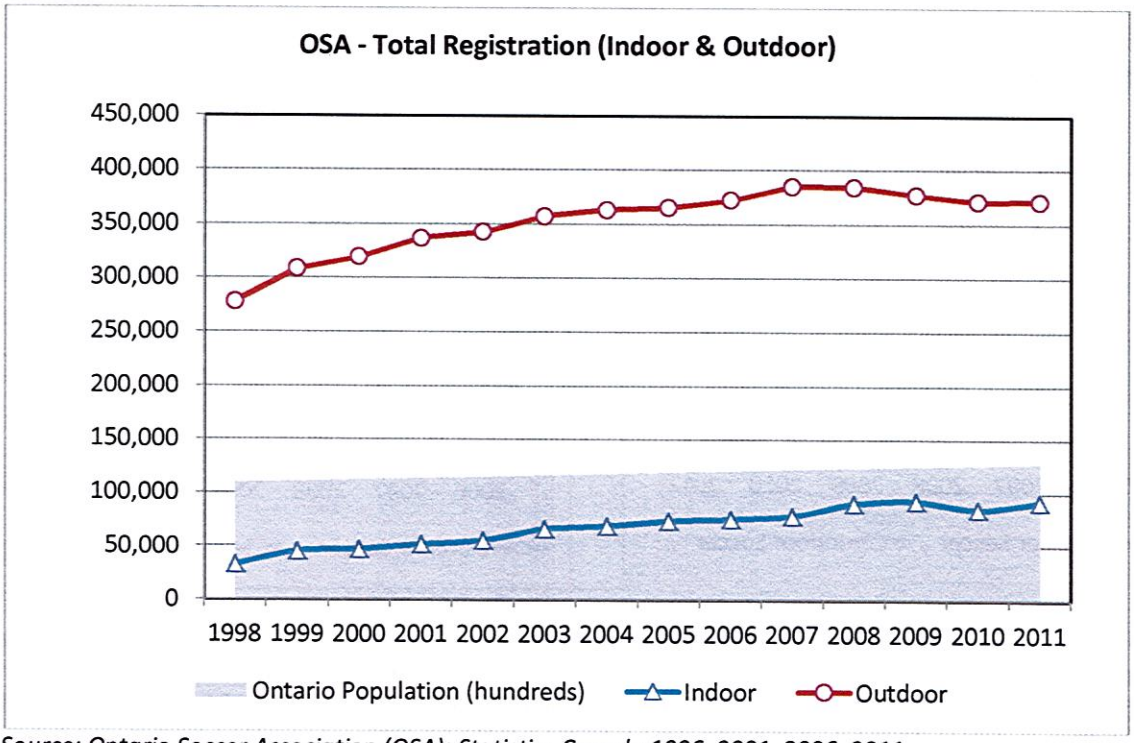
Soccer NorthEastern, which serves the Districts of Nipissing and Renfrew, has seen greater rates of growth in the sport of soccer than the provincial average. In the past six years (2005-2011), outdoor soccer registration in Soccer NorthEastern has grown by 410 players, an increase of 6.4%, which is higher than the 0.2% decline in soccer registration seen in the province during that same period and greater than Nipissing and Renfrew Districts' overall population growth rate (2.6%). While youth outdoor soccer in Soccer NorthEastern has grown overall in the last six years (2006-2011), registration declined slightly between 2010 and 2011. **The data suggests that outdoor soccer registration in the district may be beginning to level out.**

**Registration in Soccer NorthEastern (Outdoor)**

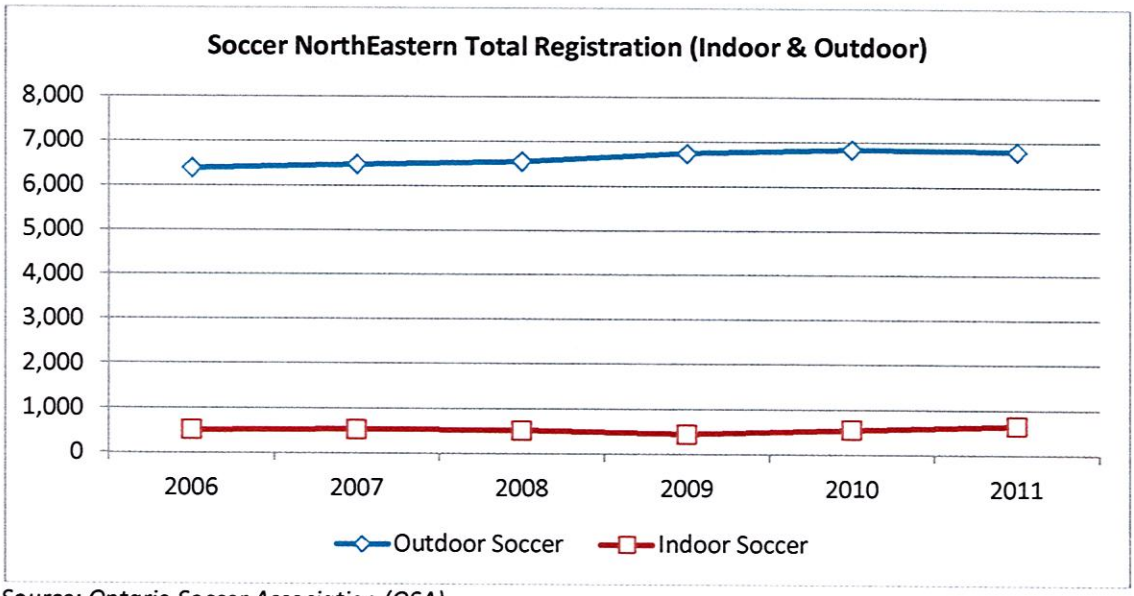
| Year | Mini/ Youth | Senior | Total | Change |
|---|---|---|---|---|
| 2006 | 5,523 | 867 | 6,390 | n/a |
| 2007 | 5,554 | 917 | 6,471 | 1.3% |
| 2008 | 5,697 | 848 | 6,545 | 1.1% |
| 2009 | 5,737 | 1,005 | 6,742 | 3.0% |
| 2010 | 5,793 | 1,042 | 6,835 | 1.4% |
| 2011 | 5,790 | 1,010 | 6,800 | -0.5% |

*Source: Ontario Soccer Association (OSA)*

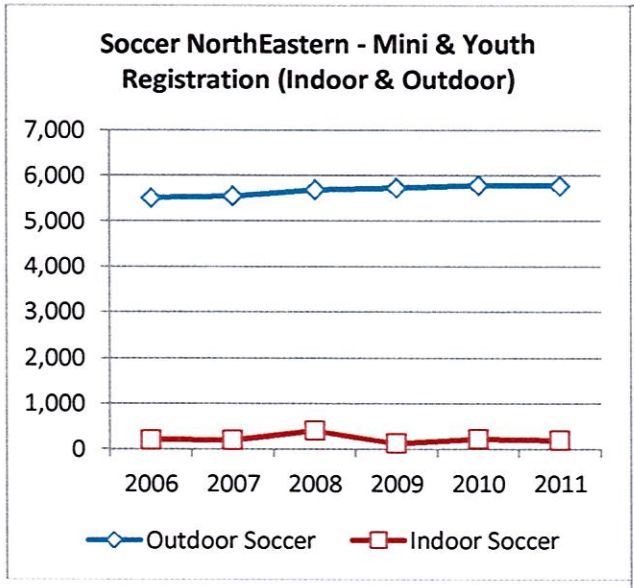
While overall soccer registration in Ontario may have begun to stabilize, registration in adult soccer leagues has increased 62% in the past ten years (2002-2011). **Increases in adult/senior outdoor soccer are also evident in Soccer NorthEastern (growth of 47% in the past six years).** Currently, the ratio of youth to adult outdoor soccer players is approximately 4 to 1 across the Province (down from approximately 5 to 1 in 2006). In Soccer NorthEastern, the ratio of youth to adult soccer players is 5.7 to 1, which is more pronounced than the provincial average. Growth in adult soccer can be partially attributed to the aging of youth soccer participants from the 1990s, and continuing participation in soccer.

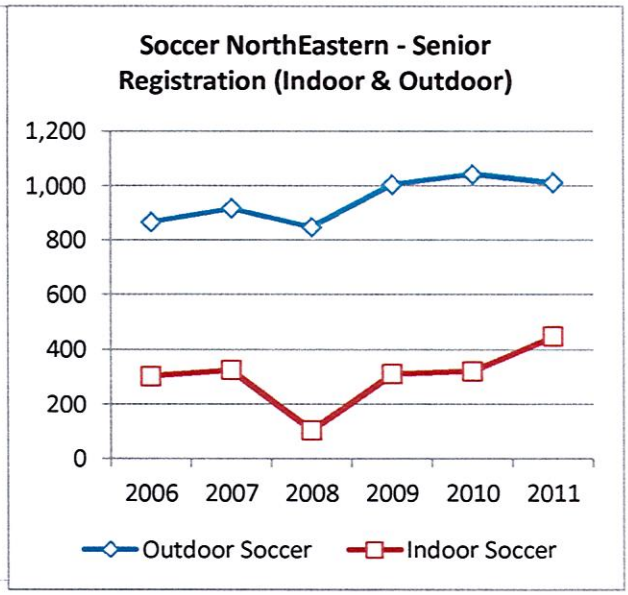



*Source: Ontario Soccer Association (OSA); Statistics Canada 1996, 2001, 2006, 2011*




*Source: Ontario Soccer Association (OSA)*




In terms of indoor soccer, the demand for indoor facilities has been driven by soccer's rise in popularity and increased emphasis on year-round training and competition. Indoor soccer pertains to a smaller segment of market compared to outdoor soccer, but is growing in popularity. As of 2011, the ratio of outdoor to indoor soccer players is 4.0 to 1 in Ontario (in 2002, the ratio of outdoor to indoor players across Ontario was 6.25 to 1). In Soccer NorthEastern, the 2011 ratio of outdoor to indoor soccer players is 10.6 to 1. Participation in indoor soccer is largely dependent on the availability, quality, and cost of appropriate facilities; in the Soccer NorthEastern district, most if not all indoor soccer is played out of gymnasiums.

**Registration in Soccer NorthEastern (Indoor)**

| Year | Mini/ Youth | Senior | Total | Change |
|---|---|---|---|---|
| 2005/06 | 194 | 303 | 497 | n/a |
| 2006/07 | 192 | 325 | 517 | 4.0% |
| 2007/08 | 398 | 104 | 502 | -2.9% |
| 2008/09 | 121 | 311 | 432 | -13.9% |
| 2009/10 | 216 | 322 | 538 | 24.5% |
| 2010/11 | 192 | 449 | 641 | 19.1% |

*Source: Ontario Soccer Association (OSA)*

**Provincially, the number of indoor soccer players registered by the OSA has increased by 68% in the past ten years (2002-2011), which is significantly higher than the 9% growth seen in outdoor soccer in that same time period.** A similar trend has also been seen in Soccer NorthEastern where the number of indoor soccer registrants has increased by 29% over the past six years, while the number of registrants in outdoor soccer has only risen by 6% in the same time period.

**Across the province, indoor soccer is quickly rising among youth registrants, and is rising even faster among adult registrants.** In the past ten years (2002-2011), indoor soccer registration across Ontario has risen 49% in the mini/youth age category and 100% in the adult/senior category.

For the 2010/11 indoor season, reported data for Soccer NorthEastern indicates that 30% of participants were in mini or youth leagues and 70% were in senior leagues. This is vastly different from the provincial average of 56% mini/youth and 44% senior. **Compared to many other associations, there is a significantly lower proportion of youth playing indoor soccer in the Soccer NorthEastern district.**

## 3.6 Other Indoor Recreational Facilities in North Bay

North Bay residents also make good use of non-municipal facilities, including (but not limited to) the following:

- The North Bay YMCA is located adjacent to Memorial Gardens and contains: an aquatic centre consisting of a 25-metre multi-lane pool with therapeutic, shallow and wading pools (the aquatics centre is operated through a partnership with the City); a fitness centre and studios; gymnasium; and small indoor walking track. The facility is accessed through memberships or day passes, with programming (e.g., swimming lessons) available to members and non-members through a registration process.
- The Canadian Forces Base (22 Wing North Bay) contains a number of recreation facilities available for community use, although priority is given to military personnel and their families. Facilities include a 25 metre 5-lane swimming pool, fitness centre, gymnasium, squash and racquetball courts, a rock climbing wall, and outdoor facilities.
- The North Bay Granite Club is a privately operated curling facility consisting of six ice sheets.
- The Golden Age Club is a 50+ Activity Centre located in the downtown area. With funding from the City and other sources, the Club offers a wide variety of programs (e.g., exercise classes, dancing classes, carpet bowling, yoga, euchre, quilting, computer training, etc.), as well as socials, dances, workshops, and trips.
- Canadore College has a gymnasium and fitness centre that are shared with Nipissing University. The University recently constructed a new triple gymnasium (Robert J. Surtees Student Athletics Centre) and will be expanding/improving other amenities in the coming years, including fitness. The College and University gymnasiums are available to the community, including for indoor soccer. The City also has agreements with the school boards for access to certain school facilities.
- There are several fitness, health and wellness providers in the community, including the YMCA, Canadian Forces Base, and private providers. Several other organizations offer instruction in gymnastics, martial arts, boxing, dance, and other recreational pursuits.

## 3.7 Sport Tourism Review

North Bay has a longstanding tradition of hosting sports events. Local or regional events – e.g., the North Bay Challenge Cup Tournament (soccer) – return to the City year after year while large, national or international tournaments – e.g., the World Ringette Championship – are brought to North Bay through a structured event bidding process.

Collectively, municipal officials, sport organizations and business leaders recognize the value of sport tourism. They understand that benefits can be realized by leveraging sport events to attract athletes and their families, coaches, officials, support staff, and spectators to the City. In fact, through the household survey undertaken for this study, 61% of North Bay's households agreed that attracting more regional, provincial, or national sport tourism events should be a high priority for City Council.

In response, a sport tourism focused working group – the Sport Tourism Action Team Strategy (STATS) – was established in December 2011. Consisting of representatives from the City (Economic Development and Parks, Recreation and Leisure Services), HOST (hospitality sector), and Sport North Bay, STATS will lead a coordinated effort to attract sport tourists to North Bay and to maximize North Bay's economic and social return from the hosting of sporting events.

STATS' initial work plan laid out an impressive list of marketing, resource development, and communication initiatives intended to raise the City's profile as a potential host for sporting events. Equally impressive is the fact that several initiatives had been accomplished by the spring of 2012.

**Adopting a Coordinated Approach**

Communities that adopt a coordinated approach to sport tourism generally follow a logical and sequential process that leads to sport tourism always being considered as an important element in strategic and economic plans of the municipality or regional jurisdiction. Material presented in the following figures has been adapted for information contained in several Yates, Thorn and Associates studies about the most effective process of developing a Sport Tourism Strategy.

**Creating Unified Awareness**


The process normally begins with municipal staff and community-minded citizens discussing opportunities to become more efficient in their collective efforts to attract sport tourists. These discussions often lead to the development of a formal sport tourism plan that includes vision and mission statements; goals and objectives; and work plans. The sport tourism plan becomes a guiding document that is as important to local decision-making as the Corporate Strategic Plan or the Recreation Services Master Plan.

North Bay's STATS working group is in the best position to lead and/or facilitate a process that will result in the development of a formal sport tourism plan. STATS has a diverse membership that will be important contributors to the plan and the group has been endorsed by municipal officials as the sport tourism lead for the City. Although no feasibility or planning studies have been completed, STATS intends to focus on attracting local and regional events plus OFSAA and NOSSA championships to the City. Furthermore, as circumstances arise, it will work with or support local sport organizations that are interested in pursuing provincial and regional level events consistent with their interests and mandates.

**Creating the Structure and Developing Partnerships**

Maximum economic benefit can be derived from sport tourism when sport groups, tourism agencies, and private enterprise work together to create an event-friendly environment that facilitates and encourages sport tourists to visit the community. This is not normally possible in the absence of an organizational framework that would govern the manner in which sport organizations, tourism specialists, local government and private sector partners can work together. The structure of the framework and the development process should be consistent with local requirements, competencies and available talent.

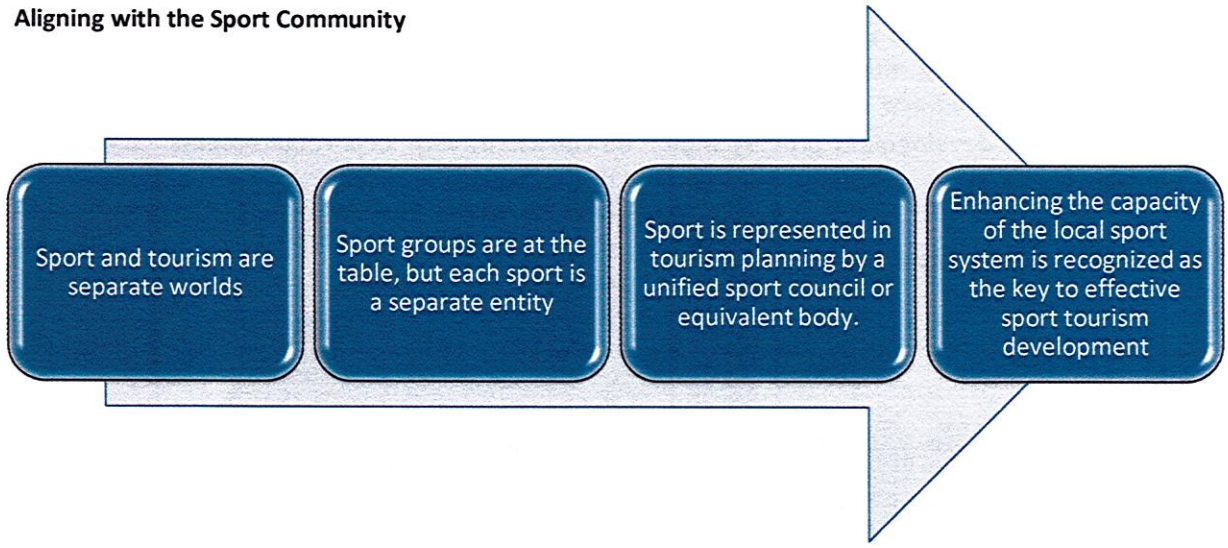
**Developing an Organizational Framework**


As is the case in most communities, until recently, sport and tourism have somewhat independently coexisted in North Bay. However, in a reasonably short period of time, STATS has undertaken an initiative through which sport hosting can become a key component of the City's tourism development strategy. The new "Sports and Meetings" section of the City's website seamlessly presents sports venues, hotels, banquet halls, restaurants, and points of interest; all of which are exceedingly important for individuals interested in selecting a location in which to host an event. The website also offers event planning tools, information about the City's Event Hosting Fund, advertising templates and other handy resources that demonstrate North Bay's commitment to making the City "event-friendly".

**Links to the Sport Community**

Experts agree that the most successful sport tourism development approach includes concerted effort to build capacity among local sport organizations to bid for and host events. This approach often involves establishing a structure that allows multiple sport groups to speak with a common voice and to strive for common goals. Again, communities often undertake a sequential process to develop effective and operationally sound links between tourism initiatives and the sport community. Furthermore, through the implementation of a process, sport organizations become comfortable working with each other and gradually develop an understanding that one group's success is not necessarily detrimental to equal levels of success of another sport. In fact, there are examples where sport groups develop strong alliances that result in the delivery of multiple sport events that may otherwise not have occurred.

**Aligning with the Sport Community**




STATS is working to strengthen its alliances with local sport organizations and to develop its sport partners' capacities to contribute to attracting sporting events to the City. Fruits of these efforts are already evident – STATS worked with the local Frisbee organization and secured the 2012 Ontario Ultimate Championships that will be hosted in North Bay in July.

Officials of STATS recognize the need to strategically align with more local sports groups and to develop meaningful relationships with an expanded variety of organizations that make up the City's sport community. These alignments will be made directly with certain sport groups or working through Sport North Bay.

**Moving Forward**

The MURF Feasibility Study is to consider the requirements necessary to attract sport tourism to North Bay and to comment on the ability of the current community indoor facilities to host sport events. It is apparent that the assessment of opportunities and the development of a structured process are already underway.

STATS has developed an inventory of local assets including sport and recreation facilities, hotels, restaurants, and other support amenities that are attractive to potential event and meeting organizers.

The next step in the process is to evaluate the attributes of each sport venue to determine its capacities and capabilities to host events. The evaluation should examine the venue's compliance with hosting requirements stipulated by sport federations/associations for various levels of events. For example, national and provincial competitions will require a higher quality or larger quantities of amenities than will be required for local or regional championships. Therefore, prescribed seating capacities, athletes' and officials' amenities, media facilities, and lodging capacities will vary depending upon the level and type of event. The assessment exercise should result in a complete listing of the key venues that will contribute to the City sport tourism plan and the capacities of each to host events at different levels of competition.

The final step in the process is to develop the City's formal sport tourism plan. Once the overarching mission and vision have been established, STATS should set goals, objectives, and associated work plans that will gradually attract additional sport tourism to North Bay. Based on recent examples, the most impressive and immediate results occur in communities that demonstrate commitment to sport tourism by dedicating both human and financial resources to planning and implementation of the plan. This usually begins as single year project funding but eventually evolves into annual budgets to pay for staff, marketing, communications, and resource development. It is noteworthy that the economic costs and benefits of sport tourism are normally distributed between the budgets of all those involved in the process. Consequently, the financial commitments to develop and execute the plan should not be solely borne by the municipality. Indeed, the plan should include a mechanism to ensure that the costs and benefits of sport tourism are shared by the sport, tourism, and local government partners.

**Sports Tourism Summary**

The process for advancing North Bay's sport tourism initiative should include the following:

- Formalize strategic hosting priorities that indicate the type and level of events in which North Bay is most interested.
- Review the City's sport facility assets identifying each facility's advantages and drawbacks from a hosting perspective.
- Identify the hosting requirements for different levels and types of sporting events and compare the requirements to the attributes of the City's facilities.
- Revisit the strategic priorities to ensure that the physical requirements of the desired types and levels of events are consistent with the facility attributes.
- Collaborating with the sport community, develop goals, objectives, and associated work plans to attract sport events to North Bay. As part of the planning process, create an organizational structure, estimated human resources support, and operating budget for implementing the plan.
- Establish a mechanism to evaluate the success of the plan and constantly monitor progress.

# Section 4: Public & Stakeholder Consultation

## 4.1 Overview

Community input is critical to identify the issues, trends, and future priorities related to indoor recreation facilities in North Bay. In order to achieve this goal, a number of consultation efforts have been undertaken, including:

- A public awareness campaign consisting of content to be posted on the City's website, media releases, posters to be displayed in public buildings, etc.;
- Random sample telephone survey;
- Staff and stakeholder workshops and interviews;
- Public open house to gather input;
- Public information session to present facility options;
- Regular meetings with the MURFAC; and
- Presentations to Council.

## 4.2 Random Sample Household Survey

To assist in the preparation of this Study, a statistically significant household telephone survey of North Bay residents was conducted in March 2012. The survey was administered to residents throughout the City and is considered to be representative of the population.

The survey collected information on the positions of respondents towards various aspects of indoor recreation facilities, usage, opinions, and priorities. This section summarizes and correlates the primary results of the household survey. The complete survey results are contained in **Appendix A**.

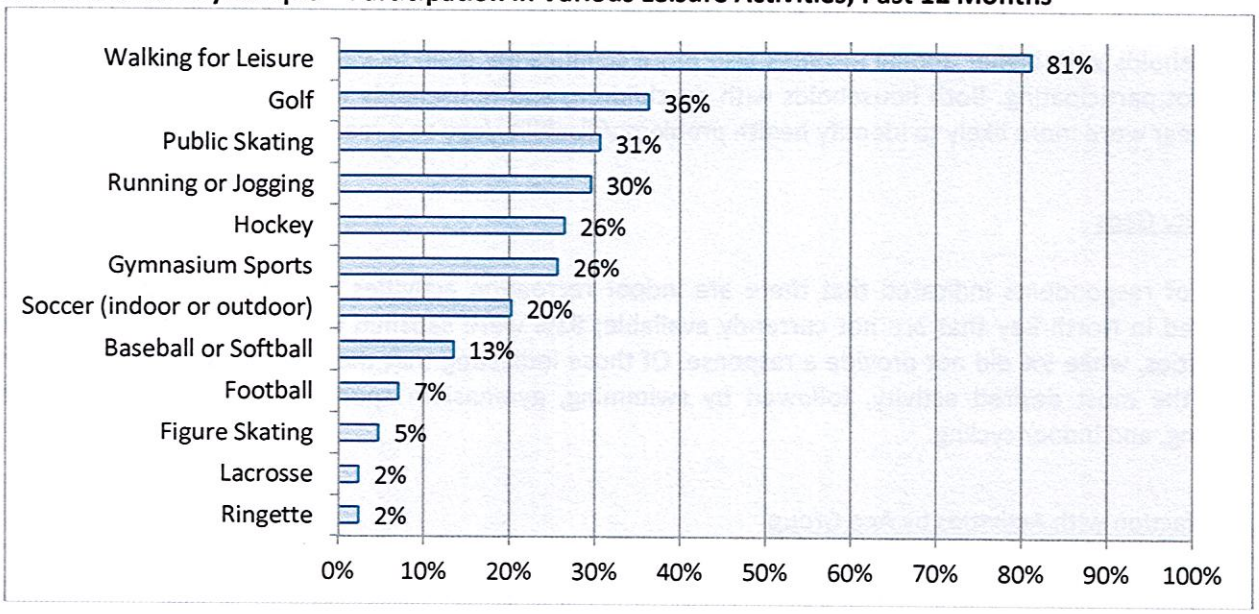
Although the survey is representative of North Bay, the survey did not specifically target those that participate in indoor recreation activities. Where possible, the survey results were separated into subsets based on socio-demographic characteristics and inferences were drawn on this basis.

**A total of 386 surveys were completed, yielding a confidence interval of ±5% (i.e. the survey provides an accuracy of ±5%, 19 times out of 20).** To qualify to take the survey, residents were required to reside within the City of North Bay and be 16 years of age or older.

Participation in Selected Leisure Activities

Walking for leisure was identified as the most popular of the listed recreation activities in North Bay, with 81% of households indicating that they have done so within the last year. In surveys of this nature, walking for leisure is typically identified as the most popular activity as it is a self-scheduled activity that can be done nearly anywhere by residents of all ages and abilities. There is a considerable drop to the second listed activity – golf at 36% – followed by public skating (31%), running or jogging (30%), hockey (26%), and gymnasium sports (26%). The last six activities are organized sports, mostly team-oriented (e.g., soccer, ball, ringette, etc.).

**Household Survey Sample – Participation in Various Leisure Activities, Past 12 Months**




29% of households have at least one member that has participated in organized ice activities (e.g., hockey, ringette, and/or figure skating) in the past 12 months. Households with children were significantly more likely to participate for a number of activities, including running or jogging, hockey, public skating, soccer, baseball or softball, gymnasium sports, and golf. In addition, households with an annual income of over $80,000 were more likely to participate in many activities, including walking for leisure, running or jogging, hockey, public skating, soccer, gymnasium sports, and golf.

Barriers to Participation

62% of respondents indicated that they and members of their household are able to participate in indoor recreation activities as often as they would like, while **39% said they are not able to participate as often as they would like**. Of the latter group, the reasons cited most often were:

- health problems/disability/age (46%),
- lack of personal time/too busy (26%),
- lack of desired facilities or programs (12%),
- lack of money/too expensive (9%), and
- program not offered at a convenient time (7%).

Since the most common barrier to participation was health problems/disability/age, the City should work to ensure that its indoor recreation facilities are accessible and provide activities for a range of ages and abilities.

In doing surveys of this nature, "lack of time" is commonly cited as the number one barrier; however, this was the second most common response in the North Bay survey. With the focus of this survey on more active recreational sports, it is likely that many older respondents felt that they are past this stage of life. **Interestingly, only 12% indicated a lack of desired facilities or programs was keeping them from participating as often as they would like.**

Households with children and households with annual incomes over $80,000 were significantly more likely to identify a lack of desired facilities or programs as a reason for not participating. Further, households with higher annual incomes also more significantly cited lack of personal time as a reason for not participating. Both households with no children, and households with incomes under $80,000 per year were more likely to identify health problems/disability/age as a reason for not participating.

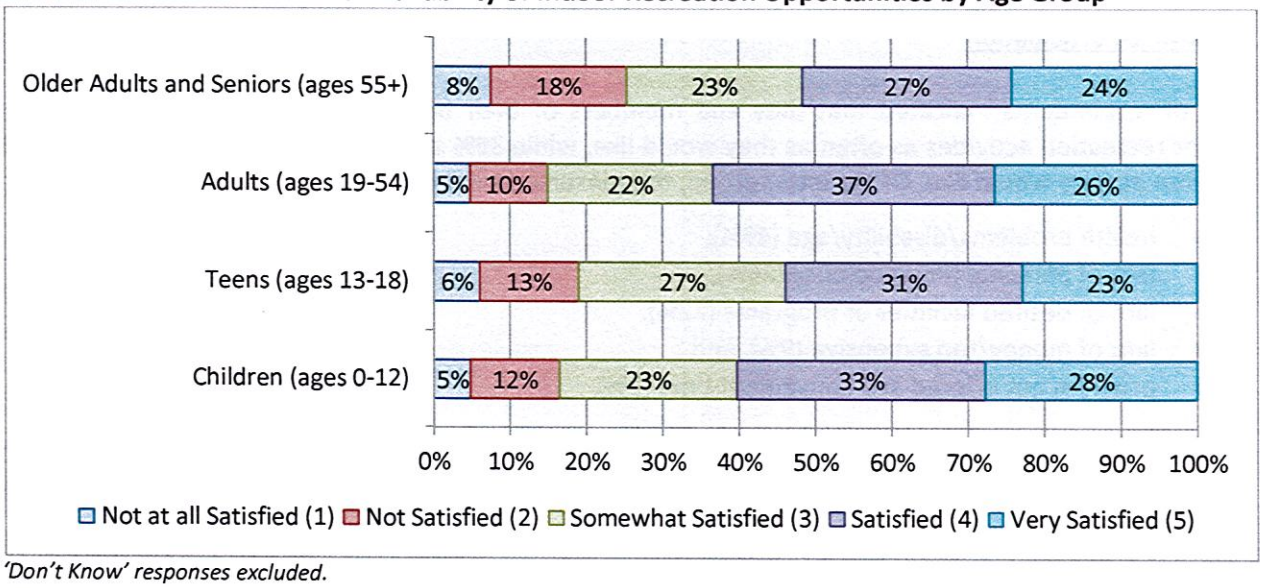
Activity Gaps

14% of respondents indicated that there are indoor recreation activities that they would like to see offered in North Bay that are not currently available; 81% were satisfied with the selection of indoor activities, while 5% did not provide a response. Of those indicating that there were gaps, indoor soccer was the most desired activity, followed by swimming, gymnasium sports, lacrosse, hockey, public skating, and indoor cycling.

Satisfaction with Activities by Age Group

Using a scale of 1 (not at all satisfied) to 5 (very satisfied), respondents were asked to rate how satisfied they were with the availability of indoor recreational opportunities in North Bay for four age groups. Respondents were most satisfied with indoor recreation opportunities for adults (ages 19-54), with 63% satisfaction. This was followed by children (ages 0-12) at 60%, teens (ages 13-18) at 54%, and older adults and seniors (ages 55+) at 52%. **Conversely, 26% were dissatisfied with activities for older adults and seniors.** For all age cohorts, the majority of respondents were either 'satisfied' or 'very satisfied' with the availability of indoor recreation opportunities, as seen in the following figure.

**Level of Satisfaction with the Availability of Indoor Recreation Opportunities by Age Group**

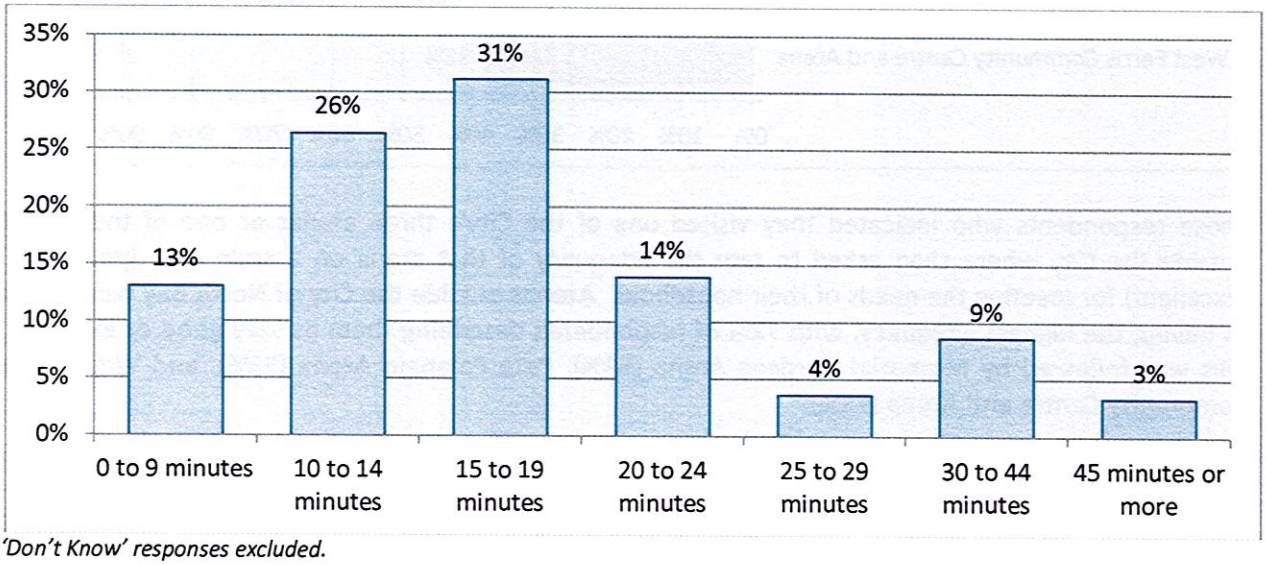



*'Don't Know' responses excluded.*

Willingness to Travel

Respondents were asked to identify a reasonable length of time for them to travel to the recreational activities that their household does the most. As can be seen in the following figure, 71% of those responding indicated that it should take less than 20 minutes to travel to these activities. The most common response (from 31% of respondents) was between 15 and 19 minutes. This finding may be important when selecting sites for future recreation activities.

**Travel Time to Recreational Activities**

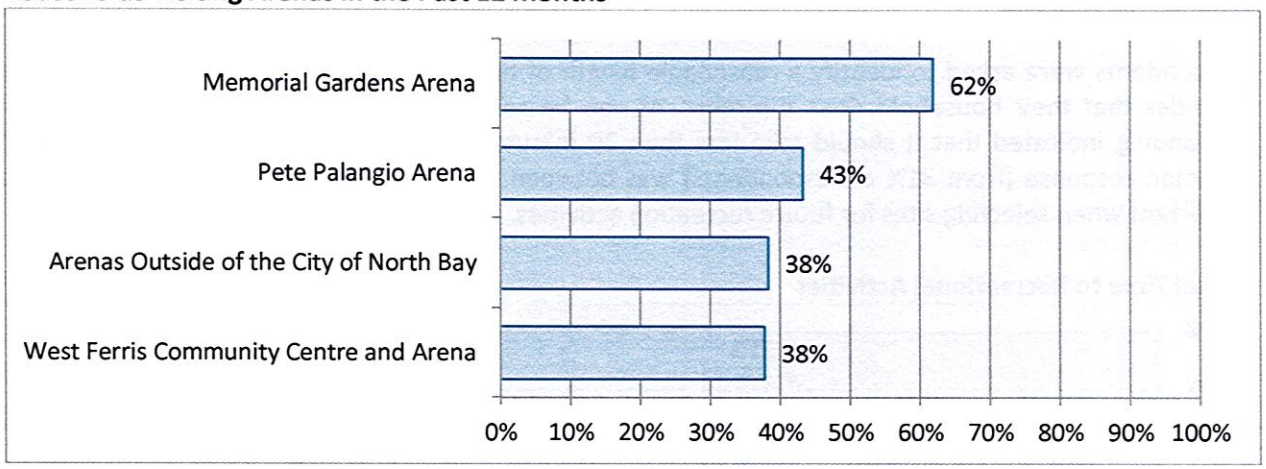



*'Don't Know' responses excluded.*

Arena Utilization & Satisfaction

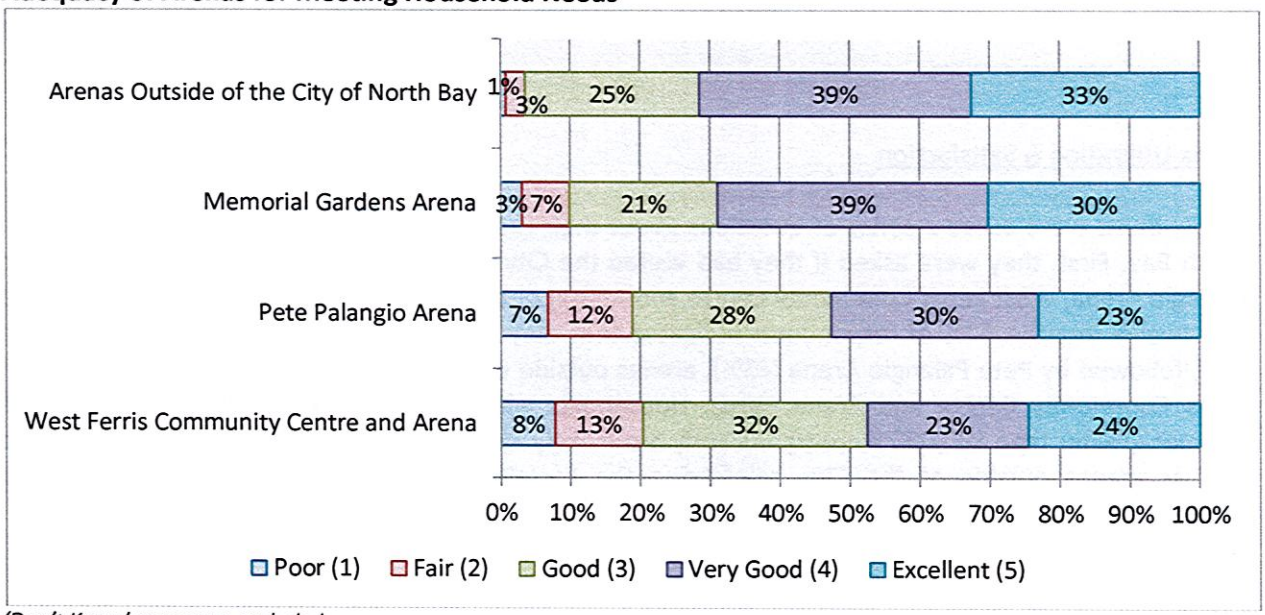
Respondents were asked a series of questions about their use of arenas within and outside the City of North Bay. First, they were asked if they had visited the City's arenas (Memorial Gardens Arena, Pete Palangio Arena, West Ferris Community Centre and Arena) or arenas outside the City of North Bay in the past twelve months. 62% of respondents indicated that they had visited Memorial Gardens in the last year, followed by Pete Palangio Arena (43%), arenas outside the City of North Bay (38%), and the West Ferris Community Centre and Arena (38%). Households with children and households with annual incomes greater than $80,000 were significantly more likely to visit all of the arenas within North Bay as well as arenas outside of the City, reinforcing the correlation between these socio-demographic indicators and participation.

**Households Visiting Arenas in the Past 12 Months**




Those respondents who indicated they visited one of the City's three arenas or one of the arenas outside the City where then asked to rate the adequacy of that arena on a scale of 1 (poor) to 5 (excellent) for meeting the needs of their household. **Arenas outside the City of North Bay were listed as having the highest adequacy, with 72% of respondents describing them as very good or excellent. This was followed by Memorial Gardens Arena (69%), Pete Palangio Arena (53%), and West Ferris Community Centre and Arena (48%).**

**Adequacy of Arenas for Meeting Household Needs**




*'Don't Know' responses excluded.*

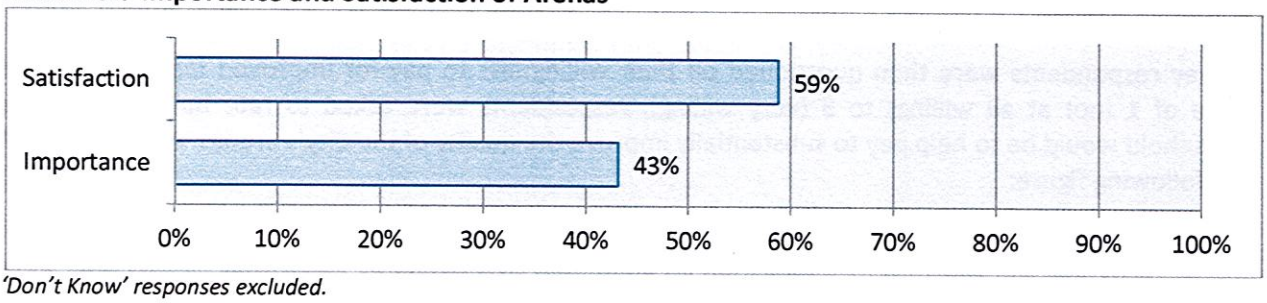
Participants were asked to rate the importance of arenas to their household, and their level of satisfaction with the arenas in North Bay. For importance, respondents were asked to use a scale of 1 (not at all important) to 5 (very important), and for satisfaction they were asked to use a scale of 1 (not at all satisfied) to 5 (very satisfied). Not including those who said 'don't know':

- 43% of respondents indicated that arenas are 'important' (4) or 'very important' (5) to their household; and

- 59% of respondents indicated that they were either 'satisfied' (4) or 'very satisfied' (5) with the arenas in North Bay.

Survey results indicate that arenas are important to less than half of the City's residents and the majority of residents are satisfied with the arenas in the North Bay. **Typically, when satisfaction rates higher than importance, this indicates that needs are generally being met.** Not surprisingly, a comparison of demographic responses revealed that arenas are significantly more important to households with children.

**Household Importance and Satisfaction of Arenas**

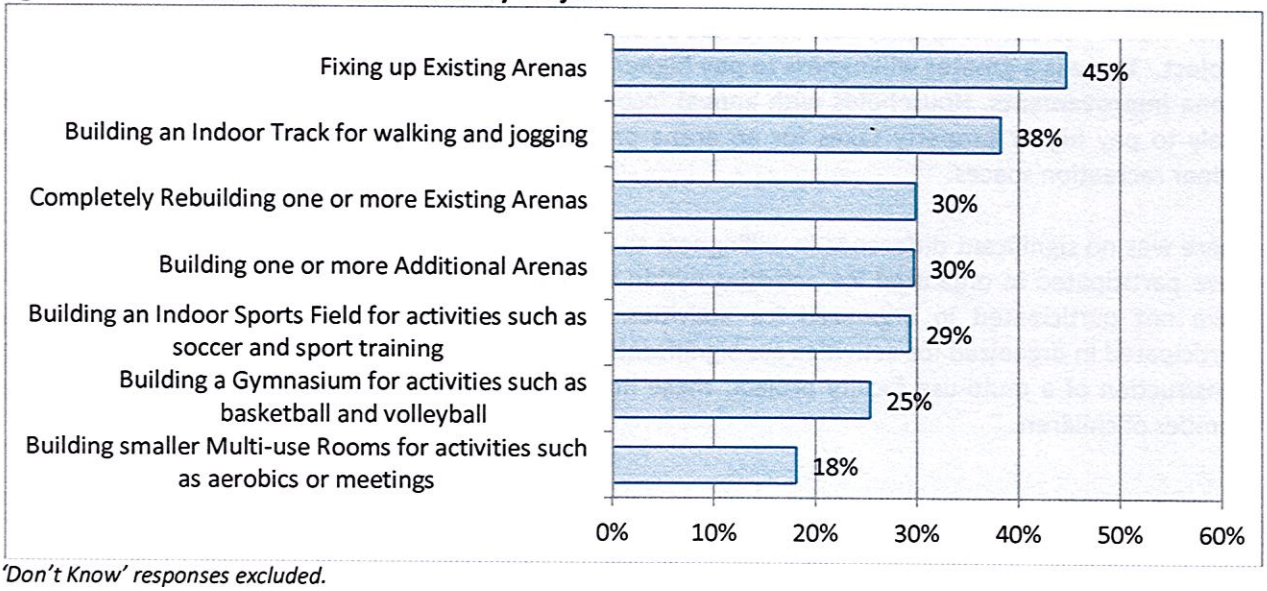



*'Don't Know' responses excluded.*

Facility Priorities

For the next question, respondents were advised that to build or improve local facilities, tax dollars are typically used to some degree. Keeping this in mind, respondents were asked to what degree the City should spend additional public funds on a list of projects. Respondents were asked to use a scale from 1 (do not spend additional money on this type of project) to 5 (definitely spend additional money on this type of project). Not including those who responded with 'don't know', the percentage of respondents who replied with a '4' or '5' is shown in the following figure.

**Agreement for Additional Public Funds by Project**




*'Don't Know' responses excluded.*

**45% of households support fixing up existing arenas**, followed by building an indoor track for walking and jogging (38%), completely rebuilding one or more existing arenas (30%), building one or more additional arenas (30%), and building an indoor sports field for activities such as soccer and sport training (29%).

Household with children, as well as households with an annual income greater than $80,000, are significantly more likely to agree to build one or more additional arena. Further, households with children are more likely to support the building of an indoor sports field and a gymnasium.

Willingness to Pay

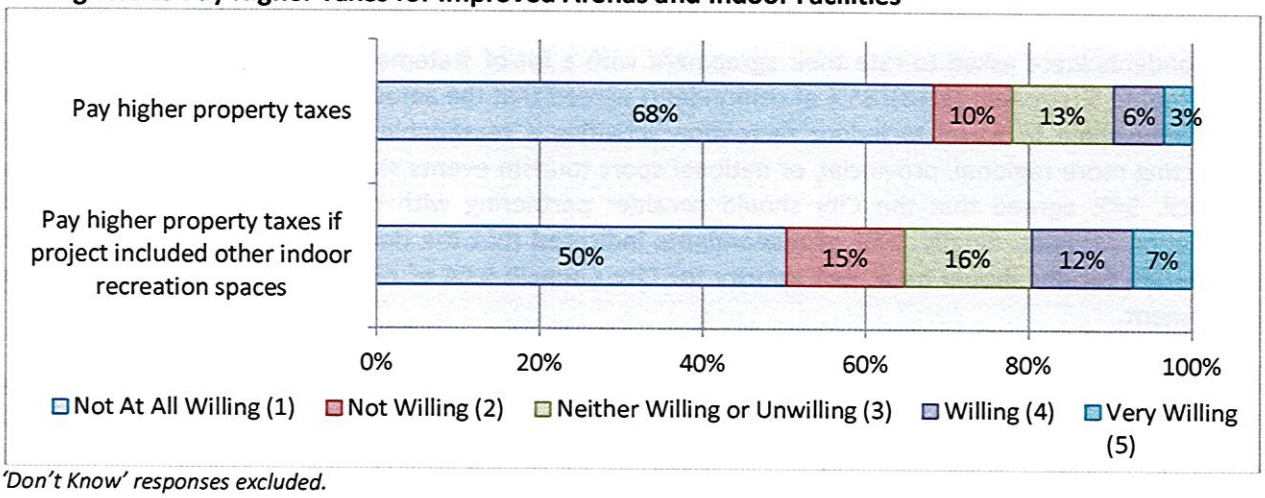
Survey respondents were then questioned on their willingness to pay for improved facilities. Using a scale of 1 (not at all willing) to 5 (very willing), respondents were asked to rate how willing their household would be to help pay to substantially improve the quality of the City's arenas. As illustrated in the following figure:

- 25% of respondents indicated that they would definitely be willing to pay an increased fee for activities and sport registrations (and an additional 39% would be somewhat willing; 36% were not at all willing),
- 16% would definitely be willing to donate funds (and an additional 43% would be somewhat willing; 41% were not at all willing); and
- 10% would definitely be willing to pay higher property taxes (and an additional 22% would be somewhat willing; **68% were not at all willing to pay higher taxes for arena improvements**).

As a follow-up question, respondents were asked how willing they would be to pay higher property taxes for an arena project if it also included the construction of other indoor recreation spaces such as an indoor track or indoor sports field. Using the same scale, 20% of respondents indicated that they would definitely be willing to pay higher property taxes for a multi-use facility project, which is double the initial willingness to pay higher property taxes for just an arena project. An additional 30% would be somewhat willing to pay higher property taxes for an arena project if it also included the construction of other indoor recreation spaces; **50% were not at all willing to pay higher taxes for a multi-use facility project. There is a greater willingness to pay higher taxes for a multi-use facility project, compared to arena improvements.** Households with annual incomes greater than $80,000 were significantly more likely to pay higher property taxes for an arena project if it also included the construction of other indoor recreation spaces.

There was no significant difference in willingness to pay for improved arenas between households that have participated in organized ice activities within the past 12 months compared to households that have not participated in organized ice activities. However, those households that have recently participated in organized ice activities are significantly more willing to pay higher property taxes for the construction of a multi-use facility project; these households were also more likely to have a greater number of children.

**Willingness to Pay Higher Taxes for Improved Arenas and Indoor Facilities**

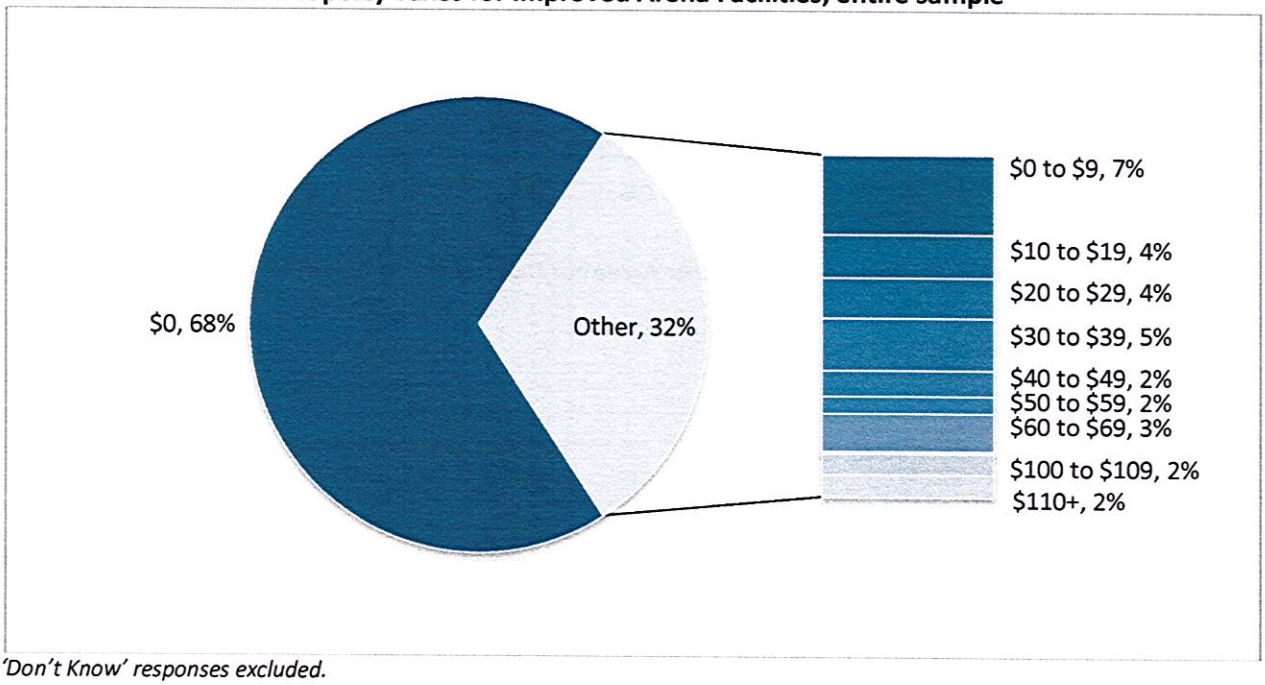



*'Don't Know' responses excluded.*

Survey respondents who indicated that they would be somewhat or definitively willing to pay higher property taxes for arena improvements were asked a follow-up question of how much extra they would be willing to pay on an annual basis. Respondents were advised that the average household will pay about $66 in taxes for the operation and maintenance of arena facilities in 2012. Across the entire survey sample (i.e., representative of the City's population), approximately 32% of residents were at least somewhat willing to pay higher taxes; this breaks down as follows:

- 7% of households indicated that they would be willing to pay $0 to $9 above their current tax rate for improved arenas;
- 12% would be would be willing to pay $10 to $39 more;
- 7% would be would be willing to pay $40 to $69 more; and
- 4% would be would be willing to pay $100 or more.

**Increase in Amount of Property Taxes for Improved Arena Facilities, entire sample**



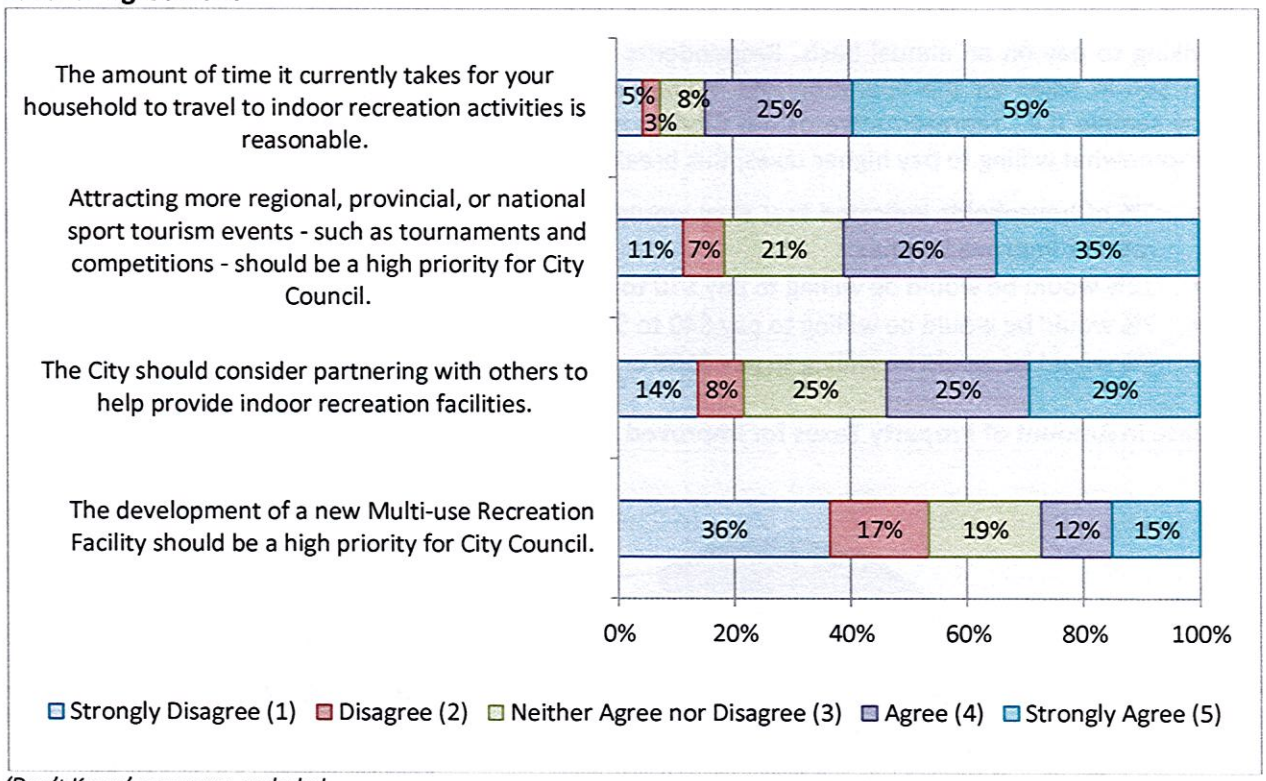

*'Don't Know' responses excluded.*

Congruence with Statements

Respondents were asked to rate their agreement with a list of statements on a scale from 1 (strongly disagree) to 5 (strongly agree). 85% of respondents agreed that the amount of time it currently takes for their household to travel to indoor recreation activities is reasonable. In addition, 61% agreed that attracting more regional, provincial, or national sport tourism events should be a high priority for City Council. 54% agreed that the City should consider partnering with others to help provide indoor recreation facilities. **Finally, 27% of respondents indicated that the development of a new multi-use recreation facility should be a high priority for City Council; 53% of respondents disagreed with this statement.**

Households with annual incomes greater than $80,000 and households with children were significantly more likely to agree that the development of a new multi-use recreation facility should be a high priority for City Council and that the City should consider partnering with others to help provide indoor recreation facilities.

**Level of Agreement**




*'Don't Know' responses excluded.*

Demographics

The following is a profile of the survey respondents:

- The average household size is 2.65 persons per household, which is slightly higher than the 2011 Statistics Canada average of 2.32 persons per dwelling occupied by usual residents.
- 32% of households have one or more children under the age of 20.

- The average age of respondents is 54 years old.
- 83% of respondents own their home.
- Respondents were asked to provide the first three digits of their postal code:
    - 58% of respondents are within the P1B postal code (central North Bay);
    - 36% of respondents are within the P1A postal code (south of the rail line); and
    - 6% of respondents are within the P1C postal code (generally north of Cedar Heights Road / Tower Drive).
- 67% of respondents provided their annual household income.
    - 24% earned over $100,000
    - 12%earned between $80,000 and $100,000
    - 16% earned between $60,000 and $80,000
    - 23% earned between $40,000 and $60,000
    - 24% earned under $40,000
- 61% of the respondents were female, 39% were male.

## 4.3 Stakeholder Interviews, Questionnaires & Workshops

In order to provide an opportunity for in-depth and candid discussions regarding community priorities, participation trends, facility needs, potential partnerships, etc., several key stakeholder interviews were conducted (in-person and by telephone) in March and April 2012. Input gathered through the interviews has been considered as part of the study's development (most notably in **Section 5: Facility Needs Assessment**). Key stakeholders that have been interviewed to date include:

- Canadore College
- Nipissing University
- Canadian Forces Base North Bay / Department of National Defence
- North Bay Chamber of Commerce
- North Bay Parry Sound District Health Unit
- Near North School Board
- Conseil scolaire catholique Franco-Nord
- YMCA of North Bay
- North Bay Public Library
- North Bay Youth Soccer / North Bay Select Soccer
- Living Fit from the Inside Out
- Hospitality Sector
- City Councillors (Chair and Vice-chair of the Community Services Committee)
- City staff (Community Services Department)

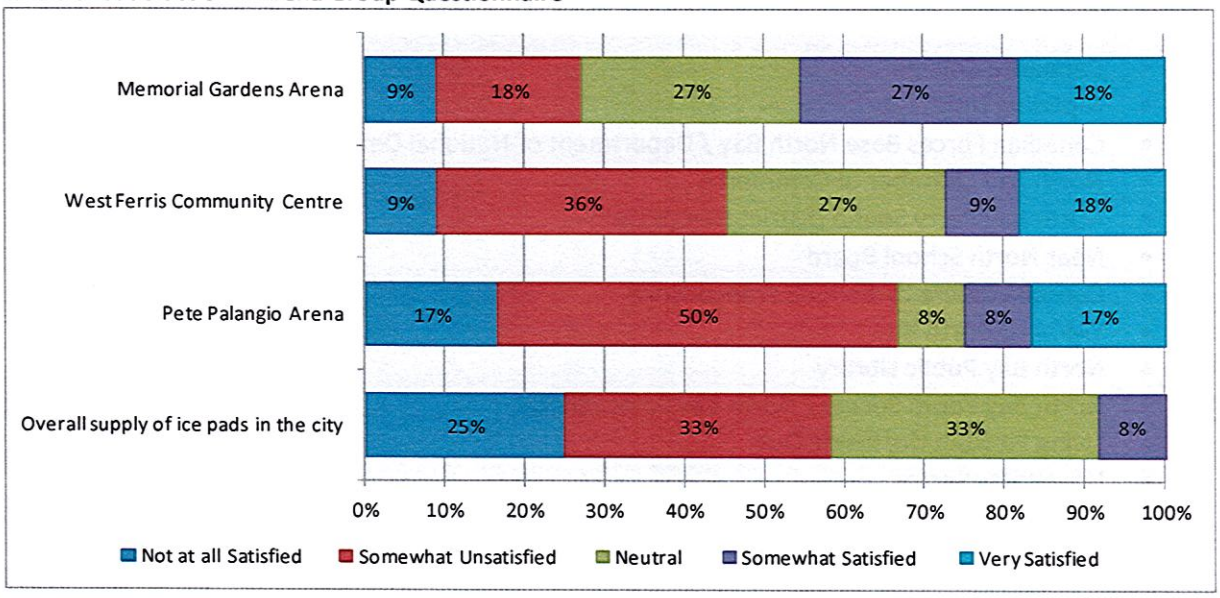
A broader selection of stakeholders (including all arena, indoor recreation, and turf user groups within North Bay) were also asked to complete a questionnaire that addressed many of the same issues. To date, a total of 21 groups have responded to the questionnaire. Input gathered through the questionnaires has been considered as part of the study's development (most notably in **Section 5: Facility Needs Assessment**).

- 22 Wing North Bay – Fitness and Wellness Centre
- Armstrong Park SC & Nipissing District Adult SC
- Canadore College Athletics Recreation and Wellness
- Nipissing Varsity Hockey Team
- North Bay Bulldogs Football Club Inc.
- North Bay Canoe Club
- North Bay District Girls Hockey Association
- North Bay Employee Hockey Tournament
- North Bay Figure Skating Club
- North Bay Legion Track Club
- North Bay Mercantile League
- North Bay Midget AAA Trappers
- North Bay Minor Hockey Association
- North Bay Selects Soccer Club
- North Bay Sledge Hockey
- North Bay Tennis Centre
- North Bay Ultimate Players Association
- North Bay Youth Soccer Club
- North Stars
- West Ferris Minor Hockey
- West Ferris Ringette Association

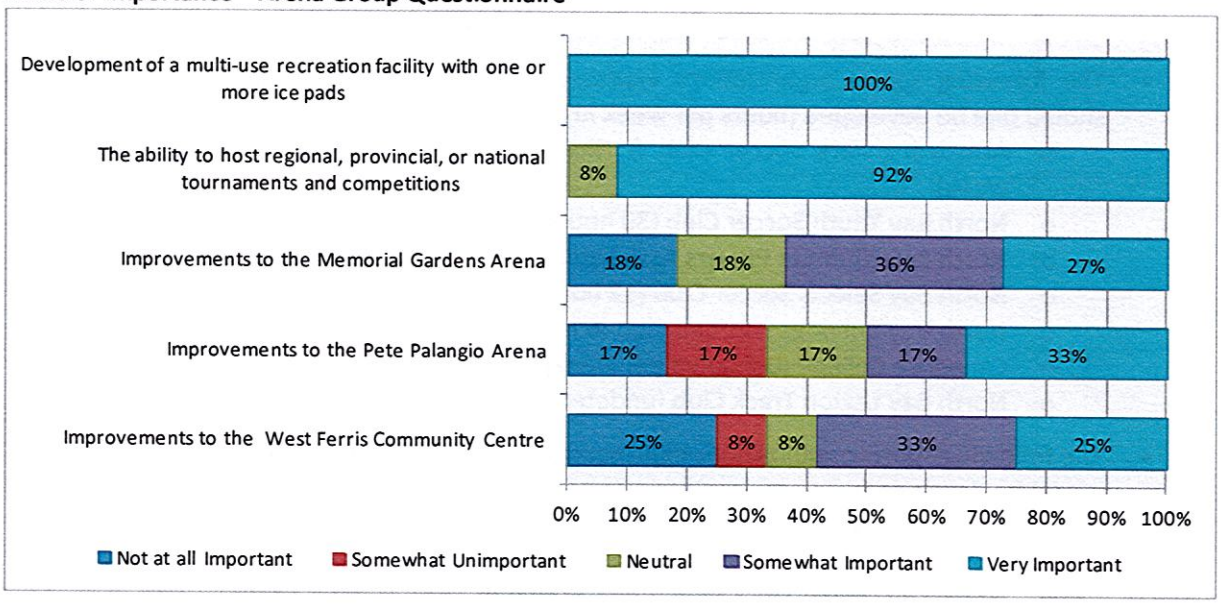
Key highlights from the stakeholder questionnaire are identified below:

- User groups were unanimous in their support for the development of a multi-use recreation facility
- Considerable interest was also expressed for an indoor turf multi-sport facility for year-round training (e.g., soccer, football, track, tennis, etc.)
- Most arena organizations identified a need for upgrades to Memorial Gardens, as well as the community rinks (improved change rooms, meeting room, viewing area, etc.)
- Some felt that there was sufficient demand for additional ice pads and the concept of a four-pad arena complex was raised by several groups (tournament venue)

**Levels of Satisfaction – Arena Group Questionnaire**



**Levels of Importance – Arena Group Questionnaire**




- Many groups cited a lack of ice/floor time and indicated that this has affected their programs through:
  - Shorter programs/schedule
  - Limited opportunities for program expansion
  - Restricted growth
  - Reduced competitiveness with other centres
  - Difficulty attracting professional coaches because of shortened season (e.g., soccer)
- Affordability was a key concern mentioned by nearly every sport organization:
  - Many felt that ice rentals were too costly
  - Nevertheless, 60% of the ice organizations indicated that they were willing to pay higher user fees for new and improved arena facilities (an average of 5% more)
  - Most soccer organizations stated a willingness to pay between market rates for indoor field rentals (generally defined as $100 to $150 per hour, although likely toward the bottom end of this range); non-soccer sports (e.g., ultimate frisbee, football, etc.) may have a greater difficulty in paying market rental rates

The stakeholder questionnaire also yielded several requests for additional access to existing or future facilities:

- Three ice sports organizations (North Bay Figure Skating, North Bay Girls Hockey, and West Ferris Ringette) indicated that they regularly use a total of 18 hours per week at out-of-town arenas. In 2008, the City collected similar data suggesting that local ice organizations used approximately 21 hours per week at arenas outside of North Bay (predominantly Trout Creek, Powassan, Astorville, and Sundridge). This figure would appear to have remained about the same over the past three to four years.
- The following requests were received for additional ice time (largely prime time hours):
  - West Ferris Minor Hockey – 8 hours per week
  - West Ferris Ringette Association – 5 to 10 hours per week
  - North Bay District Girls Hockey Association – 5 to 10 hours per week

  - North Bay Mercantile League – 5 hours per week
  - North Bay Figure Skating Club – 5 hours per week

- The following sports organizations expressed an interest in utilizing an indoor sports field, should one be developed (hours per week in peak season are displayed in parentheses):
  - Armstrong Park Soccer Club & Nipissing District Adult Soccer Club (30-60 hours per week)
  - North Bay Youth Soccer Club (30 hours per week)
  - North Bay Ultimate Players Association (15-20 hours per week)
  - North Bay Selects Soccer Club (12 hours per week)
  - North Bay Bulldogs Football Club (6 hours per week)
  - Canadore College (0-6 hours per week)
  - North Bay Legion Track Club (undetermined)
- The following sports organizations expressed an interest in utilizing a gymnasium, should one (or more) be developed:
  - Canadore College (4-10 hours per week)
  - North Bay Canoe Club (5 hours per week)
  - North Bay Legion Track Club (undetermined)
  - North Bay Tennis Centre (undetermined)

## 4.4 Public Open House and Information Session

A public open house was held on April 18, 2012 at City Hall to gather preliminary input from residents and organizations pertaining to this Study; this event was advertised through local media (newspaper, radio), on the City's website, through email, and in City facilities. Verbal and written input received through the open house has been considered as part of the study's development.

On October 30, 2012, a public information session was held at West Ferris Community Centre to present the Study's key findings and facility options (as identified in Section 6). This event was advertised through local media, on the City's website, through email, and in City facilities. Approximately 25 members of the public (including stakeholder group representatives) attended the meeting and provided input and feedback on the draft study. The presentation and comment sheet were then posted on the City's website for a period of ten days. Approximately 80 comment sheets and pieces of correspondence were received by the deadline. All input has been considered as part of the study's refinement.

# Section 5: Facility Needs Assessment

This section contains an evaluation and statement of demand for several facility types. As established by the MURF Advisory Committee, the assessment of indoor facility components is to focus on:

- arenas (for hockey, figure skating, box lacrosse, etc.), including the impact on regional arena market;
- indoor turf (for soccer, football, golf, etc.);
- indoor walking track;
- gymnasium (for dryland training, court sports, events, etc.); and
- multi-use rooms (for meetings, arts and cultural activities, active living, etc.).

Pools and fitness centres are not part of this assignment.

In identifying current deficiencies and future facility needs, a number of inputs have been utilized, including:

- current condition of existing facilities, including design/maintenance challenges;
- "provision targets" that represent a recommended measure of the demand based on a combination of accepted industry standards, market-driven factors, and other local circumstances;
- public input;
- stakeholder input, including rental requests;
- trends in participation;
- current and projected utilization, with consideration to future population characteristics; and
- partnership potential.

The following analysis looks at the various components that could comprise a new multi-use recreational facility or that could be contemplated as stand-alone facility projects. It bears noting that the household survey found more support for a multi-use facility project than a project that only addresses arena facilities. Nevertheless, only 27% of survey respondents indicated that the development of a new multi-use recreation facility should be a high priority for City Council; 53% of respondents disagreed with this statement.

## 5.1 Arenas

The information presented in the preceding sections of this report identified several key findings relative to the supply and quality of the City's existing arena facilities, as well as possible strategies for future improvements.

**In terms of the existing arenas, user groups also expressed considerable concern about their quality more so than their quantity.** Sections 3 and 4 have documented the many challenges with existing arenas; the most notable of which include:

- Small, poorly designed change rooms;
- Accessibility concerns (e.g., change rooms in basement at Pete Palangio Arena);
- Under-sized ice surfaces; and

- Lack of modern amenities and comforts, which can limit tournament / event potential.

Public and stakeholder input also revealed the following in terms of demand and future arena strategies:

- 29% of North Bay households have at least one member that has participated in organized ice activities (e.g., hockey, ringette, and/or figure skating) in the past 12 months. 43% of respondents indicated that arenas are 'important' or 'very important' to their household.
- The stated demand for a 5th indoor ice pad was modest; some groups felt that there was a lack of ice time, while others were content with their current level of access.
- There was considerable support for the concept of a multi-use recreation facility amongst stakeholders, but less so amongst the general public.
- Pete Palangio Arena needs the most attention (although West Ferris Community Centre was not far behind); many are supportive of a complete replacement.
- Memorial Gardens is a well-loved and functional arena that should be maintained. 69% of household survey respondents felt that its adequacy was very good or excellent. Strategic improvements should allow for it to continue meeting the City's longer-term needs.
- While some would prefer for West Ferris Community Centre to be replaced, concerns over its removal from this neighbourhood were also expressed.
- Affordability was a critical issue raised through the household survey and user group consultation process.

**Key Demand Factors**

Within this context, the following discussion identifies key factors that – to one degree or another – are impacting demand for arena facilities in the City of North Bay.

a) Ice sports continue to be in demand in Canada and pressures on indoor ice rinks. **The demand for prime time ice (evenings and weekends before 10pm) is particularly acute across the province as the window of acceptable rental times is shrinking.** Future outlooks suggest that ice demand will remain steady at current participation rates, although there could be annual fluctuations 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, although figure skating has generally been in a slow decline. Ice hockey remains popular with children and young teens and the aging population could result in greater than current demand for 55-plus hockey teams.

b) Within the past twenty years (1991-2011), the number of youth in North Bay has declined by 25%, which has reduced the pool of potential prime time arena uses. More recently, youth registration in organized ice activities increased by approximately 8% between the 2008/09 and 2012/13 seasons in the City, almost entirely as a result of gains in girls' hockey. Nationally, participation in girls' hockey is beginning to stabilize – a scenario that can be expected to be seen in North Bay in the coming years. **Future declines in youth ice sport registration are imminent given that the youth demographic is projected to decrease by 9% over the next ten years.** Slow population growth beyond 2021 could see youth registration return to near current levels if participation rates remain stable.

c) Many of the ice sport stakeholder groups that participated in the consultation program for this Feasibility Study stated a need for additional ice time. **There were requests for a total of 28 to**

**38 additional local hours of prime time ice from five organizations (see section 4.3).** The City's 2000 Tourism and Leisure Long-Range Plan noted requests for 27 additional hours of ice time per week to serve youth hockey and ringette needs, as well as allow for expansion to girls' ice hockey. Comparing these two figures, it would appear that the demand for additional ice time has remained relatively stable over the past decade.

d) **The growth of competitive teams may lead to a small increase in ice demand.** In 2012/13, the AAA hockey program will be adding one team (for a total of four), creating a need for dedicated practice time and further entrenching North Bay as a "hockey town". The University also expects to create a women's varsity hockey team for 2013 (most of the team's play will occur on selected weekends, thereby minimizing its impact on a week-to-week basis). While some of these teams will largely result in a redistribution of existing registrants, the calibre of play will create a need for additional ice time (e.g., for practices, etc.).

There has been discussion in the community about what the recent announcement relating to the relocation of an OHL franchise to North Bay may mean for the City's arenas. Based on experiences in other communities, an OHL team requires an amount of ice time similar to what the Lakers/Trappers are each current using. On paper, this accounts for an average of about 10 hours of prime time ice per week (in addition to non-prime hours), which is roughly equivalent to **0.2 (one-fifth) of an ice pad**. The real impact of the OHL team is dependent upon the outcome of the City's negotiations regarding arena access, as well as the negotiations with the two current contract rentals – the Nipissing Lakers and the NOJHL Trappers. At the time of this report, these negotiations are ongoing.

e) Actual usage of arenas outside of the City by North Bay groups is difficult to quantify, as the West Ferris Minor Hockey Association employs a unique approach that requires the coaches of its rep hockey teams to secure their own ice contracts for practices. 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. **A single booking contract and scheduling model – combined with a fulsome allocation policy that relates registration to allotted hours – may result in a more efficient use of available ice time locally and in the region.**

Nevertheless, local demand may be somewhat constrained by the lack of ice time, as some groups are seeking opportunities in other communities. Through the stakeholder survey, **three ice sports organizations indicated that they regularly use a total of 18 hours per week at out-of-town arenas**. Local organizations have been relying on outlying arenas for rentals for a very long time and this practice is widely accepted. In fact, through the household survey it was revealed that as many households have visited arenas outside the City of North Bay as those that have visited West Ferris Community Centre (38%). Many of the outlying arena facilities offer ice at more favourable times and rates and, as a result, the ones that are closer to North Bay draw organizations from the City.

f) Through the household survey, the community's satisfaction ratings for arenas were found to be higher than their importance ratings, suggesting that **community needs are generally being met**. With that being said, only 59% were satisfied with the City's arena facilities. This finding is likely an indication that **arena facilities only serve a specific sub-set of the population and do not appeal to all age groups.**

The survey data also indicated that:

- 45% of North Bay households support fixing up existing arenas;
- 30% support completely rebuilding one or more existing arenas; and
- 30% support building one or more additional arenas.

When the draft report was presented to the public in late 2012, moderate to strong demand was expressed for a fifth (or even sixth) municipal ice pad. While this input is not statistically significant like the household survey, it does indicate that there are a number of current arena users that support expanding the arena supply in order to reduce travel to outlying communities and to attract additional tournaments.

**Projection of Arena Demand**

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.

Because ice requirements are so closely linked with a community's age profile, a **participant-based provision target** that is linked to demographic forecasts is used to project current and future needs. This approach is preferred over a per capita standard as it is able to account for changing participation rates and the City's unique demographic composition. It is a target that will grow with the City and one that can be fairly applied for years to come.

To coincide with 2011 Census data, registration data from the 2011/12 season is used in this analysis. As of 2011/12, it was estimated that there were approximately 3,112 registered participants playing ice sports in North Bay. This translates into an average of **778 participants per ice pad**. Estimates from the 2012/13 season suggest that this figure may be slightly greater given the continued growth in girls' ice sports, however, some of this growth is being offset by declines in male registration. Year-to-year fluctuations in registration are common and, therefore, the use of facility provision targets should be flexibly applied.

Research collected regarding provision standards for ice pads suggests that in urban municipalities similar to North Bay, **one ice pad per 650 to 800 participants is common – the City is currently operating at a level close to the top end of this range.** This standard generally allows for youth participants to utilize prime time hours, for adults to utilize shoulder hours (and a limited amount of prime time hours), and for a typical number of tournaments and competitions to be accommodated, with little to no extra prime and shoulder time availability. This is not a capacity calculation, but rather an indication of what a comfortable operating range would be where supply and demand are generally in equilibrium. There are a number of factors that could alter this provision target, including the ratio of youth to adult participants, the ratio of house league to rep players, and the degree of access required by tournaments and municipal programs.

The usage profile of North Bay's arenas is very comparable to that of an "average" urban community of its size, including the ratio of youth to adult participants, the mix of recreational and competitive teams, and the range of activities. **Therefore, for North Bay, a provision target of 1 ice pad per 725 registered participants (youth and adult) is recommended**; this is in the middle of the typical range seen in comparable communities.

The following table applies this provision target to 2011/12 registration and population levels, as well as future population forecasts to identify future needs. This model assumes that participation rates will remain steady and the future usage profile will be similar to the current usage profile.

**Ice Pad Demand Analysis – City of North Bay**

| | 2011/12 (actual) | 2021 (projected) | 2031 (projected) |
|---|---|---|---|
| **City-wide Population** | 53,651 | 55,293 | 56,475 |
| **City -wide Youth Population (ages 4-18)** | 8,813 | 8,043 | 8,643 |
| **City -wide Adult Population (ages 19-54)** | 26,591 | 24,954 | 24,618 |
| **Projected Participation – Youth / Special Needs (21.9% capture rate)** | 1,931 | 1,762 | 1,894 |
| **Projected Participation – Adult / Competitive (4.4% capture rate)** | 1,181 | 1,108 | 1,093 |
| **Projected Participation – Total** | **3,112** | **2,870** | **2,987** |
| **Provision Target** | 1 : 725 registered participants | | |
| **City -wide Needs** | **4.3** | **4.0** | **4.1** |
| **Existing Ice Pad Supply** | 4 | | |
| **Surplus (deficit)** | **(0.3)** | **0.0** | **(0.1)** |

*Population projections are based on Watson & Associates, 2009; age cohort estimates prepared by MBPC, 2012.*

Based upon the current usage profile, recommended provision target, and projected participation, **there is currently a demand for 4.3 ice pads**. This supports the finding that the City's arenas are generally operating at capacity, which is why some groups feel that they are lacking ice time. However, to warrant the development of an additional ice pad, most municipalities would wish to ensure that it be used to near capacity, such that a deficit would be at least 0.75 pads and/or with future growth potential to approach or exceed one full ice pad. **The current deficit of 0.3 ice pads is not substantial enough to warrant the provision of a fifth ice pad, particularly given that current demand appears to be at or very near to peak levels.**

Although the City's overall population is expected to grow modestly (5% by 2031), the demand for arenas is expected to decrease over this period due to increases in the City's median age (a factor which is affecting nearly all communities in Ontario and beyond) and the fact that older adults are not primary arena users. In fact, the number of youth (ages 4-18) is expected to decrease by 2% over the next twenty years. By 2031, if the population projections come to bear and participation rates remain steady, there will be demand for 4.1 total ice pads in North Bay. **Although the analysis recognizes a small deficit at present, there is insufficient justification for the development of an additional indoor ice pad.**

**Recommendation:**

There is insufficient demand for a fifth indoor ice pad in the City of North Bay between 2011 and 2031. Participation levels, ice utilization, demographic projections, arena supplies in surrounding communities, and negotiations with contract renters should be monitored in order to undertake periodic reviews of local ice requirements.

## 5.2 Indoor Soccer/Turf Fields

There are no indoor soccer facilities in North Bay or surrounding communities. Some (primarily adult) indoor soccer activities take place in local school and post-secondary gymnasiums. The City also has two new artificial turf fields at the Steve Omischl Sports Complex that opened in late 2011. These outdoor synthetic fields will allow for the outdoor season to begin earlier and extend later into the year (e.g., from March to November). An indoor sports field, however, is the only type of facility capable of accommodating year-round soccer and rectangular sport field activities.

Public and stakeholder input revealed the following in terms of indoor soccer / sports field demand:

- The household survey revealed that 20% of households contain at least one member that has participated in soccer (indoor or outdoor) in the past twelve months, and 7% that have played football.
- 14% of respondents indicated that there are indoor recreation activities that they would like to see offered in North Bay that are not currently available, with the most significant gap being indoor soccer.
- 29% of North Bay households support building an indoor sports field for activities such as soccer and sport training.
- The Youth and Select soccer organizations indicated that they could use approximately 50 hours per week to run soccer programs on a proper indoor turf field. The adult soccer organizations interviewed for this study identified a need for up to 95 hours per week on an indoor turf field. This represents approximately 87% utilization of a two-field indoor complex (during prime time only), which is the type of facility that the City of Sault Ste. Marie built in 2012.
- While soccer is likely to be the key driver for an indoor sports field, a number of other sports have expressed interest, including ultimate frisbee and football.
- There is positive support from the local sports community for such a facility, but it was recognized that two key success factors will be partnerships (most likely with user groups and/or educational institutions) and cost feasibility.
- When the draft report was presented to the public in late 2012, moderate demand was expressed for an indoor sports facility, with a slight preference for a permanent facility over an air-supported bubble. Partnerships were raised as being a matter to look more closely at (including a joint venture with post-secondary institutions), as well as the possible conversion of a surplus arena to an indoor turf venue.

**Key Demand Factors**

Within this context, the following discussion identifies key factors that – to one degree or another – are impacting demand for indoor soccer facilities in the City of North Bay.

a) **In North Bay – as in many communities across the Province – outdoor soccer has overtaken hockey as the most popular youth sport** (2,550 youth soccer players versus 1,931 youth hockey players). The participation rate for youth soccer in North Bay is higher than the provincial

average (29% versus 13%) and that of many comparable communities. The popularity of soccer is also expanding into all seasons, which requires indoor facilities.

b) **The development of indoor turf facilities is an emerging, but widespread trend across Canada.** The following points provide a brief overview of some of the key drivers behind this:

- Demand for soccer has risen dramatically over the past two decades. This can be attributed to the gender neutrality of soccer, its affordability, its relevance to a wide range of ethno-cultural groups, and increased exposure at all levels. Indoor soccer appeals to a smaller market segment than the outdoor game, but has the potential to continue to grow in popularity[7], particularly with trends suggesting increased interest in adult soccer.
- The number one reason for not participating in sports activities is "lack of time". Indoor facilities are not affected by the weather the way that outdoor fields are and, as such, allow people to participate when they have the time.
- The capacity of many soccer organizations is maturing, resulting in a greater emphasis on year-round player development and training excellence.
- Sports other than soccer are also emerging and seeing the benefit of year-round play and training opportunities. Depending on their design, indoor turf facilities can be utilized for a number of sports in addition to soccer; including lacrosse, football, ultimate frisbee, golf practice, baseball training, lawn bowling, special events and party rentals.
- The design of indoor sports facilities is improving. For example:
  - the recent introduction of "field turf" technology provides a more natural, grass-like surface;
  - numerous construction options and facility components are available, including air supported domes (which are more affordable than pre-engineered structures and are gaining support in several communities), permanent buildings, or converted facilities (such as a re-purposed arena); and
  - many communities are building them as part of other community complexes to make use of economies of scale and to accommodate cross-programming opportunities.
- With sufficient demand levels, most indoor turf facilities generate strong cash flows and healthy profit margins, but can be challenged to maximize usage during the summer and daytime hours. While not necessarily revenue generators, the inclusion of an indoor walking track and utilization of the field for pre-school and senior programs during the daytime can add significant benefit to the community.

c) **There is an established market for indoor soccer and considerable growth potential in North Bay.** The adult indoor soccer league that operates out of the Canadore College gymnasiums has approximately 308 players and uses about 24 hours per week (on weekends); however, with a new varsity basketball program in 2012/13, there is concern over the continued availability of this facility.

[7] Provincially, the number of indoor soccer players registered with the Ontario Soccer Association increased by 183% between 1998 and 2011.

Furthermore, a few years ago, North Bay Youth Soccer surveyed its members, and just over half indicated an interest in playing in an indoor league during the winter. Not long ago, a youth indoor soccer program was offered for one season at Nipissing University; despite very limited marketing, this program attracted about 200 players.

d) In many communities, indoor soccer facilities are often operated in **partnership** with local soccer clubs or private organizations to reduce construction and/or operating costs and to maximize usage. Relationships between municipal governments, other public agencies, and community organizations have represented valuable ways to offer service delivery benefits for years. If operations are maximized, many indoor turf facilities can generate strong cash flows and healthy profit margins.

   In North Bay, both post-secondary institutions have expressed interest in using an indoor sports facility for supporting their curriculum and/or campus/varsity athletics. A half-field bubble remains part of Nipissing University's long-term campus recreation plan; however, there is no established funding or timetable at this point in time. There may also be interest from the private sector and/or boards of education to consider a partnership of some form. These options will be explored in more detail at the next phase of this study.

**Projection of Indoor Sports Field Demand**

From the consultants' experience, we have found that nearly every urban community in Ontario with a population over 100,000 has at least one indoor sports field and some communities less than half this size are beginning to provide or consider such facilities. The decision to provide an indoor turf facility is driven by a variety of factors that may be unique to each community, including strength of local organizations, activity interests, socio-demographic profiles, willingness to travel, regional supplies, construction and operating cost, etc. As a result, a per capita provision target is not the recommended approach for determining indoor sports field needs; rather, it is more appropriate to look at the usage potential from local sports organizations.

North Bay Youth Soccer and North Bay Select Soccer have approximately 2,550 registrants. In addition, soccer is played at the high school level and a number of adult soccer leagues also serve the City. It is estimated that there are a total of nearly 3,500 organized soccer players (youth and adult) in North Bay. During the winter, 308 players are registered in the Armstrong Park & Nipissing District adult indoor soccer league (2011/12 season). Football (505 registered players, including high school) and ultimate frisbee (300 registered players) are two other sports that have expressed interest in using an indoor sports field, although there could be opportunities for other sports (e.g., baseball, lacrosse, golf, etc.) to utilize the space for training and special events.

**The stakeholder survey and interviews generated requests from several turf groups for a total of 116 to 127 hours per week during peak season,** with about 95 hours coming from soccer organizations (these groups indicated a greater willingness to pay market rental rates for such a facility). Potential off-peak season usage is considerably lower and more variable as most activities shift outdoors.

There are approximately 55 prime time hours per week (Monday to Friday from 5 to 10 p.m. and Saturday to Sunday from 7 a.m. to 10 p.m.) and 19 shoulder hours (Monday to Friday from 4 to 5 p.m. and every day from 10 p.m. to 12 a.m.) available to an indoor sports field facility. As such, it is

reasonable to expect that a one-field indoor facility could be comfortably used up to 74 hours per week, a two-field complex for up to 148 hours per week, and a three-field complex for up to 22 hours per week; these figures do not include usage during the daytime (which would likely be more sporadic).

**Based on these requests, the current demand is equivalent to 1.6 to 1.7 indoor turf fields in peak season.** However, if sports other than soccer are unable to utilize the facility for one reason or another (e.g., cost, access, design, etc.), this demand could be reduced to approximately 1.3 fields. Some usage could also come from non-residents; however, this will depend on several factors and is likely to be a minor factor given the smaller population counts of surrounding communities.

While relying on stated requests from user groups is one approach to determining needs, these requests can also be confirmed using a number of demand metrics. For example, the average indoor soccer program requires 1 hour per week on an indoor field for approximately every 10 players; this ratio can vary slightly depending on the age of the participant (the field can be divided in two for games involving smaller children) and the level of competition (rep teams require more practice time).

There are currently 2,550 players in the North Bay Youth and Select Soccer Clubs' outdoor programs, plus more in local adult leagues. Data from communities across Ontario suggest that for approximately every four outdoor soccer players, one will also play indoor soccer if the facilities are available; this percentage may be even higher if the supply of indoor facilities was not constrained. Based on this percentage, the theoretical local demand for an indoor soccer field in North Bay would be approximately 945 players (which is 25% of youth outdoor players, plus the 308 adult players currently playing indoors). This is likely a conservative estimate, as a previous survey completed by the youth club indicated that up to 50% of its outdoor registrants might be interested in indoor opportunities. Adding a reasonable 20% boost in total participation results in an estimated 1,134 participants.

Using this approach, it is estimated that the demand for indoor soccer programs is likely between 945 and 1,134 participants. **Applying the ratio of 1 hour to every 10 players to this range finds a demand for 1.3 to 1.5 indoor sports fields for soccer alone.** This validates the requests submitted by the soccer clubs and assumes that all groups would shift their indoor soccer programs away from gymnasiums.

This calculation does not account for access by other sports; however, profiles from other indoor facilities suggest that soccer will be far and away the predominant use. Unless there is a unique non-soccer group that requires significant access, the proportion of non-soccer usage is likely to be close to 10% or 15%. Accounting for these factors and by combining the two approaches, **the demand for indoor turf facilities (for all indoor community uses) in the City of North Bay is currently assessed at 1.5 to 1.7 fields. Partnerships with educational institutions may hold the key to maximizing usage of such a facility if a two-field complex is desired.**

Given the projected aging of the population and the City's modest population growth, the size of the youth/adult market for indoor sports is likely at or near its peak. By 2031, it is expected that this market would decline by up to 4% – a small figure given the considerable growth potential of indoor sports. **Long-term demand for an indoor sports facility is anticipated to be very similar to current demand.**

It bears noting that the manner in which indoor sports field facilities are designed, funded, and operated varies widely across the province. They can be domes or permanent structures (converted or purpose-built); they can be small (similar to an outdoor mini field) or large (similar to an outdoor major field); and they can be funded/operated by the municipality, not-for-profit group, or private sector (or a

combination thereof). That being said, most indoor fields are about 200 feet by 100 feet, which allows for 5-a-side play and is more economical to build than a larger template. The fields can also be used for sports such as minor baseball, field hockey, football, lacrosse, rugby, and other events, although soccer is typically the predominant activity. Furthermore, the financial viability of an indoor soccer facility is heavily influenced by its size, type of construction, and operating model.

With the analysis identifying demand for 1.5 to 1.7 indoor turf fields, there are several options for how such a facility could be developed, including as a facility conversion, air supported dome, or pre-engineered structure. In addition, the number of fields could be influenced by the type of construction desired. Based on the projected demand – and assuming some partnership potential with the education sector and local sports organizations – **it is recommended that the City pursue the provision of two indoor turf fields (each approximately 200 feet by 100 feet)**, located side-by-side with a curtained divider (or similar design feature). With a two-field complex, it is likely that most prime time hours would be utilized during peak season; however, demand for shoulder and daytime would be much more limited. Full utilization of this facility may require the development of new programs or activities, particularly during daytime hours. This model would also allow some flexibility for booking and hosting special events and tournaments, as well as options for the installation of a non-regulation indoor running track.

**Recommendation:**

There is sufficient demand in the City of North Bay and area to develop two indoor sports fields (approximately 200 by 100 feet each). Opportunities to develop such a complex in partnership with local organizations and the education sector should be explored. This facility should be developed as part of a multi-use recreational facility or outdoor field complex.

## 5.3 Indoor Walking/Jogging Track

The City of North Bay does not currently have a purpose-built indoor walking or jogging track within any of its recreational facilities. The North Bay YMCA contains a small indoor track; however its size and cost to use are deterrents to many. The concourse of the Memorial Gardens Arena is often used by local residents for walking (at no cost), as is Northgate Mall. However, these options are not very appealing to many due to the concrete flooring and non-dedicated space, nor are they suitable for competitive training.

North Bay's harsh winter climate lends itself well to indoor activities and – for the large majority of the population – walking is their primary recreational activity. This is particularly true for older adults and seniors; parents with young children and rehab patients are also a primary market for such a facility due to the social and therapeutic benefits. The household survey found that 38% of North Bay households support building an indoor track for walking and jogging.

Furthermore, in early 2011, several letters of support for providing a new recreational facility were submitted by various organizations and individuals within North Bay's recreation, tourism, and accommodation sectors. These letters were in response to two public meetings held around this time to establish support for conducting a feasibility study aimed at examining a variety of recreation, health,

and wellness facility needs in the community. At one of these meetings, 40 individual comment sheets were returned, indicating a high level of support for an indoor walking track within a multi-use recreational facility. In addition, 65% of residents who participated in the review of the draft report in late 2012 supported the addition of a walking/jogging track to a future facility (30% did not support this option), indicating strong support for this feature; a small number of requests were also received for an indoor running track capable of being used for competition and/or training.

Many multi-use recreation facilities are now including indoor walking tracks in response to high levels of demand. As seen in facilities across the Province, there are numerous facility designs that allow for walking tracks to be easily accommodated (e.g., encircling a signature ice rink or indoor turf field, elevated above a gymnasium, incorporated into a fitness centre, etc.). The track surface can also be made of a rubber composite that lessens the effects of high impact walking (e.g., stress on knee and ankle joints) and should have designated lanes for walking and jogging.

An indoor walking track can be a lower cost facility option in terms of capital and operating costs (although it is not likely to be revenue-generating). This amenity has been found in other communities to be well used in the winter season (and also year-round) and would assist in improving physical activity levels for many residents, particularly the aging population that is seeking more recreational opportunities. One of the goals of the City's Recreation, Sport and Healthy Active Living Strategy (2007) was "to expand the supply of casual, unorganized opportunities for sports, recreation and active living". Affordability of programs and recreational opportunities was also a key theme expressed through both the Activity Living Strategy and this Feasibility Study.

The City's Tourism and Leisure Long-Range Plan (2000) recommended that the need for a running track be considered in future plans for multi-purpose community facilities. This direction is supported by this study and it is recommended that any new arena, indoor soccer, or multi-use facility development give strong consideration to the inclusion of an indoor walking/jogging track. Opportunities could also be explored for creating a track surface and design suitable for training by competitive athletes.

**Recommendation:**

An indoor track for walking, jogging, and/or running should be included in a new arena, indoor soccer, or multi-use facility development.

## 5.4 Gymnasiums

The City of North Bay does not provide any gymnasiums, but rather relies on the education sector for these amenities. Input collected for this study suggests that elementary and secondary school gymnasiums are well utilized, with little additional capacity. The gymnasiums at Nipissing University and Canadore College are especially well used by the community, including for adult indoor soccer. As the student population of these post-secondary institutions expand (along with their varsity sports programs – Canadore College is fielding a varsity basketball team in 2012), community availability of the gymnasiums could be reduced.

Modest demand was expressed through the consultation program for additional gymnasium space (the household survey found that 25% of North Bay households support building a gymnasium as part of a

MURF; a small number of requests were also received through the draft report feedback mechanism), mainly for multi-sport dryland training and not for any one particular sport. While indoor soccer programs could use additional access to gymnasiums, the preferred facility design for this sport is an indoor sports field. If an indoor sports field is provided, this would allow soccer to reduce its use of gymnasiums, thereby freeing up space for other programs. This is the preferred approach and, as such, the provision of a gymnasium in a new multi-use recreation facility is not recommended at the present time. Efforts to maximize community access to elementary, secondary, and post-secondary gymnasiums should continue to be a priority.

Notwithstanding this direction, gymnasiums are highly flexible spaces that can be utilized for a very wide range of activities, sports, and events. Should an indoor sports field not be developed in North Bay, the City should monitor demand for gymnasium space and continue to consult with local stakeholders regarding access to suitable local facilities. Subject to expressed demand, the City may consider options for developing a gymnasium in the long-term, co-located with a local recreational facility.

**Recommendation:**

There is insufficient demand to recommend a gymnasium as part of a new multi-use recreation facility, particularly if an indoor sports field is developed. Efforts to maximize community access to elementary, secondary, and post-secondary gymnasiums should continue to be a priority. Should an indoor sports field not be developed, the City should monitor demand for gymnasium space and may consider options for developing a gymnasium (co-located with a local recreational facility) in the long-term.

## 5.5 Multi-use Program Space

Meeting and activity rooms are mandatory amenities within any modern multi-use recreation facility. While there are several schools, non-profit associations, and private clubs that offer space for rent for various activities and parties in North Bay, none can offer the added bonus of being co-located with an arena and/or indoor soccer facility. These types of spaces take advantage to economies of scale associated with operation and maintenance and also maximize rental and cross-programming opportunities. In order to meet a variety of recreation and cultural needs, community meeting and multi-purpose spaces (generally ranging in size from 600 to 1,500 square feet) should form important parts of any new recreation facility in North Bay.

The demand for multi-use space is difficult to project but is known to be strong in many communities due to the flexibility of this type of space. As the City does not offer direct recreational programming, use of multi-use rooms would be facilitated largely through rentals and partnerships. In this regard, affordability should be an important consideration.

Promoting higher levels of physical activity is one of the key objectives established for the City, as is facilitating recreational activities and community events for all age groups. Active healthy living activities can be accommodated within properly designed multi-use spaces (e.g., with suitable flooring, adequate ceiling height, storage, etc.). The spaces that are ultimately included within future facilities should be suitable for a wide range of community programming and rentals, such as introductory dance, martial arts, aerobics, after-school programs, arts and crafts, birthday parties, meetings, dinners, etc. Dryland training for ice sports was also a common request heard through the consultation program.

**Recommendation:**

Flexible, multi-use activity rooms should be included in any new arena, indoor soccer, or multi-use facility development.

## 5.6 Seniors' Space

A key theme that was consistently communicated through the consultation program and research was recognition that the City of North Bay has an aging population and arena infrastructure does very little to serve older adults. 26% of household survey respondents were dissatisfied with current activities for older adults and seniors. There were several suggestions for spaces that could accommodate seniors' activities (both passive and active, including low cost fitness opportunities) – an indoor walking track was certainly a well supported feature for this reason. Memorial Gardens Arena is made available for walking everyday, except during events.

Despite a small decline in the City's overall population between 1991 and 2011, North Bay's 55+ population has increased by nearly 40%. Further, projections suggest that the number of older adults and seniors (age 55+) is expected to increase by 30% over the next twenty years. The City's median age has been and will continue to be on the rise.

Public input suggests that seniors may be an underserved market; a factor that will only worsen as the population grows. While the Xity partnership with the Golden Age Centre provides a valuable service to the City's seniors' community, input suggests that it lacks the space needed to deliver additional programs. This Feasibility Study does not hold all of the answers for this challenge; the mandate of this study is on active indoor recreation spaces and is not intended to be a coordinated or comprehensive strategy for older adult services. A more thorough examination of older adult service and facility requirements should be undertaken by the City and its partners, with a more extensive look at service delivery options and accessible spaces across all of North Bay.

**Recommendation:**

The City should work with community partners to prepare a coordinated older adult strategy that examines service delivery options and accessible spaces for North Bay's older adult community. This strategy may consider opportunities for new recreation facilities to serve this growing demographic.

## 5.7 Other Potential Components

Singular requests were received for other facilities (e.g., indoor tennis facility, conference centre, power lifting centre, restaurants, etc.); however, these and other indoor facility components have not been assessed at this time. Should a potential partner emerge that wishes to work with the City as part of a future facility expansion or development, this possibility may be evaluated at the appropriate juncture. Any proposal should be accompanied by a proper business plan and funding commitment acceptable to the City.

**Recommendation:**

The City may entertain proposals from proponents wishing to use or operate other facility components within a future multi-use recreational facility. Proposals must be accompanied by proper business plans and be acceptable to the City, with consideration being given to appropriate community access and financial sustainability.

# Section 6: Guiding Principles & Facility Provision Options

## 6.1 Summary of Key Findings

Based on the preceding sections, the following findings are useful in identifying guiding principles and potential options for the renovation, expansion, and/or construction of arenas and/or multi-use recreational facilities:

1. **The City's arenas, although well maintained, are aging and poorly designed. Upgrades to and/or replacement of the City's arena infrastructure needs to be planned for.** This is a higher priority than building additional ice surfaces (which cannot currently be justified). Specifically, the following issues have been noted, all of which will become more acute over time:
    a. All ice pads are undersized for older youth/adults and competitive play;
    b. Some rinks have significant design flaws (e.g., dressing rooms, accessibility, etc.);
    c. The rinks are not well suited to accommodating large tournaments;
    d. Facility configurations are not as efficient as they could be (e.g., twin pad; multi-use); **new single pad arenas are <u>not</u> recommended**; and
    e. The cost to maintain the facilities is rising.
2. **The number of children and youth in the City is in decline, but will soon stabilize** – this age group has traditionally driven sport participation rates. As a result:
    a. There is insufficient demand for additional ice surfaces; and
    b. There is growing demand for other indoor activities that can serve a variety of age groups, such as indoor soccer, walking / jogging, and seniors' activities.
3. **There remains capacity for additional rentals at arenas outside of North Bay.** If the City were to increase its arena supply, this would potentially threaten the viability of one or more arenas in neighbouring communities.
4. **Due to its size and ability to host larger events, Memorial Gardens is a valued community asset and should be maintained and/or upgraded.** The cost to completely replace this facility is likely prohibitive, but its location is excellent and presents an opportunity for the expansion of community recreation infrastructure. Several improvements are now underway as part of the City's agreement with the OHL team.
5. **Pete Palangio Arena is poorly designed and there is local support for its replacement.** The location of this facility is also not as valued as the other rinks. As a twin pad, however, it is the City's most operationally efficient rink.
6. **The West Ferris Community Centre is also an aging facility that, due to its shortcomings, has garnered some support for replacement.** Furthermore, due to its wood truss construction, its long-term viability is more uncertain. There is insufficient land to twin this facility on site and the construction of a replacement single pad arena is not recommended. Due to the facility's significance as the "Home of Ringette" and its importance within this neighbourhood, this site should continue to be used for community uses.
7. The availability of funding is limited at present, at least from traditional sources. Users and taxpayers have expressed concern over paying substantially more than they do now. **As a result, longer-term strategies may be required, as will collaboration with other stakeholders and users.**

## 6.2 Guiding Principles

The following Guiding Principles are core directional statements that are intended to guide the development and implementation of this Feasibility Study and the City of North Bay's future decision-making relating to major indoor recreation facilities. The principles are largely complementary, but no one principle takes priority over another – they should be read and interpreted as a set, rather than as separate, isolated statements.

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.

## 6.3 Facility Provision Options

Given the deteriorating state of the City's recreational infrastructure, this report recommends some level of investment in North Bay's arenas. At a minimum, this means strategic upgrades relating to accessibility, functionality, and/or user comfort. On the other end of this spectrum is the complete replacement of one or more arena facilities, as well as the provision of an indoor turf facility. Also being considered are options between these two scenarios.

One option that is not being recommended is to simply "do enough to keep the doors open" on existing arenas (i.e., only making the minimal investments in health and safety aspects with no substantive changes to arena designs or systems). This option will not bring any existing facilities up to current standards (i.e., it is not responsive to community desires) and is also likely to lead to higher operational costs over time. Moreover, this approach is not sustainable over the longer-term as it would cause greater (and more rapid) deterioration of the City's arenas and would not address the arenas' considerable shortcomings. **If infrastructure improvements are delayed, the "do nothing" approach is likely to lead to greater expenditures over the long-term.** Nevertheless, while this scenario is not recommended, it will be used as a baseline option when comparing the additional spending requirements of each of the arena provision options being considered in this report.

Based on the aforementioned findings and guiding principles, the following arena and indoor turf facility provision options are presented for further analysis and examination.

Note: Future demand for gymnasiums, seniors' space and/or leasable space will be determined based on further study and/or partnership development. Consideration should also be given to the potential for new (and impact on existing) outdoor recreation facilities; this item is outside the scope of this study and should be determined through further consultation with the community and stakeholders.

**Arena Provision Options**

The needs assessment indicates that the City should continue to maintain a supply of four indoor ice surfaces. Given the age and shortcomings of the current arena facilities, it is recommended that the City begin planning for upgrades to and/or replacement of one or more of these facilities. Subsequent sections of this study further explore the viability of each of the following options. Depending on the timing of implementation, some of these options are not exclusive; for example, the City may undertake certain upgrades to existing arenas in the short-term and replace one or more arenas in the longer-term, with the understanding that this approach would lead to greater cumulative capital costs. The provision of an indoor turf facility (Option B2) may be combined with any of the following options to create a multi-use recreation facility (MURF).

Option A1: Upgrade one or more Existing Arenas

Undertake significant upgrades to one or more existing arenas in order to meet resident expectations and accessibility guidelines. Improvements could include (but may not be limited to):

a) Memorial Gardens Arena:
- Expand the ice surface by 10 feet to the south and expand seating
- Upgrade/replace the existing spectator seating
- Add two additional change rooms
- Install elevator access to the Super Suite at the north end

*Note: With the announcement that an OHL team will begin play in North Bay in 2013, the City has embarked on a process to undertake many of these and other improvements to Memorial Gardens.*

b) Pete Palangio Arena:
- Build new change rooms at ground level
- Update the central viewing area, lobby, etc.
- Expand the ice surfaces by 20 feet (from 180'x80' to 200'x80'); note: expanding the width is not feasible

c) West Ferris Community Centre:
- Improvements to change rooms
- Update the lobby / viewing area
- Expand the ice surface (from 180'x80' to 200'x80'); note: expanding the width is not feasible
- Widen corridors/doorways for improved accessibility

*Note: In order to maintain municipal facilities in a condition that is both functional and responsive to community needs, upgrades will be required to all existing facilities over time. Expansion of one or more ice surfaces is recommended to respond to growing concerns over player safety; not all municipal ice surfaces need to be expanded to NHL-regulation size as scheduling practices can direct higher level play to the larger rinks.*

Option A2: Replace Pete Palangio Arena

Decommission Pete Palangio Arena and replace it with a new twin pad facility at a location to be determined; design may include an indoor walking/jogging track.

Option A3: Replace West Ferris Community Centre

Decommission West Ferris Community Centre. The future use of this building should be determined through further study, with a focus on community uses. Add one new ice pad (which may include an indoor walking/jogging track) to the Memorial Gardens Arena to create a twin pad facility. At this time, the improvements identified in Option A1a for Memorial Gardens Arena should be undertaken.

Option A4: Replace Pete Palangio Arena & West Ferris Community Centre (Options A1a, A2, and A3)

Decommission both Pete Palangio Arena and West Ferris Community Centre. Upgrade Memorial Gardens Arena as per Option A1a. Build three new ice pads (one of which may include an indoor walking/jogging track) on one or more different sites, possibly phased over time:

a) Three new ice pads at the Memorial Gardens site to create a quad pad arena (this option received considerable support from the public during the review period for the draft report); or

b) One new ice pad at the Memorial Gardens site to create a twin pad arena and two new ice pads at a location to be determined.

**Indoor Turf Facility Provision Options**

The needs assessment indicates that there is demand for two indoor sports fields (approximately 200 by 100 feet each), ideally provided through some form of partnership with local organizations and the education sector. This facility should be in the form of a multi-field facility at one location; therefore, only one of the following options should be selected. The provision of an indoor turf facility (in one form or another) can be pursued regardless of which arena provision option is chosen. Subsequent sections of this report further explore the viability of each of the following options.

It is also important to note that the size, construction type, location, and operation of an indoor turf facility could vary depending on the form of partnership. Further discussion will be required with potential partners to explore these options in more detail.

Option B1: Install a Bubble over an Artificial Turf Field

Install an artificial turf field and seasonal or permanent bubble on a site to be determined, ideally in partnership with the education sector and/or local user groups.

Option B2: Build a Permanent Indoor Turf Facility / MURF Option

Build a permanent indoor turf facility (e.g., pre-engineered structure), ideally in partnership with the education sector and/or local user groups. This facility may be connected to a new or existing arena to create a multi-use recreational facility.

*Note: A third option – **converting an existing arena facility into an indoor turf facility** – was considered in the early stages of this study. Converting a redundant arena facility into such as use would result in a poorly designed indoor turf facility due to the undersized floor area, low ceiling, accessibility concerns, and the facility's overall poor condition. Although an arena conversion could be considered as a temporary stopgap before a proper turf facility is built, Options B1 and B2 offer far superior value to this scenario. As a result, this option is not evaluated further in this report.*

# Section 7: Capital and Operating Cost Estimates

This section contains:

- high level concept plans and capital cost estimates for the proposed options;
- operating cost estimates for the proposed options, including an examination of potential user fee impacts; and
- a review of funding considerations.

**NOTE: The capital and ongoing operational costs associated with modern recreational facilities are substantial. The facility improvement options contemplated in this Study will result in a significant improvement in local indoor recreational facilities (e.g. arenas that meet today's standards in terms of size, amenity, etc.), which will result in improved recreational opportunities and enjoyment for facility users. In order to improve the quality of its arenas and indoor recreation facilities, the local community – and user groups in particular – must participate financially alongside the City towards resulting operational and capital costs. There are many ways to achieve this (as discussed further in Section 7.4 and 8), including user fees, surcharges, fundraising, sponsorships, and various forms of partnerships."**

## 7.1 Capital Cost Analysis

Capital cost estimates have been prepared for the options identified in Section 6. The options – including the components, sizes, and costs – should be considered preliminary and subject to change during future stages of the project. These are a number of factors that can influence capital costs and the following assumptions have driven the analysis:

- Construction costs can vary significantly due to instability of material costs, labour costs, and other economic factors. Market rates for supplies (most notably steel and any oil-based product) and labour have risen dramatically within the past 5-10 years; it is not uncommon for construction costs to have doubled during this timeframe. The estimates in this report represent a basic level of building construction and finishes and should be considered as a Class D budget. As a result of these factors, sizable contingencies have been applied which, depending on the City's expectations and external pricing factors, may be able to be refined at the next stage of the process.
- As there are still many unknown factors with potentially significant cost implications – including the suitability of the site(s), the types of finishes, the form of construction (e.g., design-bid-build, design-build), and the ultimate facility design – the cost estimates in this Study are intentionally conservative.
- The overall size of facilities is increasing due to accessibility requirements and design principles. Furthermore, facility designs and resident expectations continue to evolve, requiring a greater attention to detail and new features that are focused on user comfort.

The following table identifies the preliminary capital costs for the various options. Combination of one or more options may result in economies of scale or reduced requirements. More detailed costing sheets and concept plans are included in **Appendix C**.

**Estimated Capital Costs by Option**

| Option | Description | Construction Cost | Soft Costs & Contingencies | Total Cost |
|---|---|---|---|---|
| **A1a** | **Upgrade Memorial Gardens Arena:**<br>• Lengthen the ice surface by 10 feet and extend seating along the sides (net gain of 400)<br>• Develop a new back of house<br>• Replace the spectator seating (net loss of ~424)<br>• Add two additional change rooms | $4.4 million | $1.6 million | **$6.0 million** |
| **A1b** | **Upgrade Pete Palangio Arena:**<br>• Lengthen ice surface by 20 feet<br>• Build new change rooms at ground level<br>• Update central viewing area, lobby, etc. | $8.4 million | $3.0 million | **$11.4 million** |
| **A1c** | **Upgrade West Ferris Community Centre:**<br>• Lengthen surface by 20 feet & replace ice plant<br>• Expand four change rooms<br>• Update viewing area, lobby, etc.<br>• Widen corridors for improved accessibility | $4.7 million | $1.7 million | **$6.3 million** |
| **A2** | **Replace Pete Palangio Arena (new twin pad):**<br>• Includes two new ice pads (seating for approx. 175/pad) and ancillary amenities; location tbd<br>• Option for indoor walking/jogging track | $20.9 million | $5.5 million | **$26.4 million** |
| **A3** | **Replace West Ferris Community Centre at Memorial Gardens:**<br>• Includes one new ice pad (seating for approx. 175/pad) and indoor track at Memorial Gardens<br>• Includes upgrades as per Option A1a | $16.8 million | $4.8 million | **$21.6 million** |
| **A4** | **Replace Pete Palangio Arena & West Ferris Community Centre (quad pad):**<br>• Includes Options A1a, A2, and A3, with the result being a quad pad at Memorial Gardens | $36.9 million | $10.1 million | **$47.0 million** |
| **B1** | **Install a Bubble over an Artificial Turf Field:**<br>• Two indoor turf fields within a seasonal or permanent bubble, along with support building<br>• Location tbd | $4.4 million | $1.1 million | **$5.5 million** |
| **B2** | **Build a Permanent Indoor Turf Facility / MURF:**<br>• Two indoor turf fields within a permanent building, along with support amenities<br>• Location tbd | $10.3 million | $2.7 million | **$13.0 million** |

Notes:

1. Construction costs include building construction, renovation, and expansion. The cost estimates are based on the current construction climate. Totals may not add due to rounding.
2. Soft costs include disbursements, consulting fees, management fees, legal fees, permits, basic inspection and testing, commissioning, contingencies, and a one-year escalation cost of 2.5%, as well as site development costs (unless otherwise noted under construction costs) such as servicing, parking lot, landscaping, etc.
3. Costs exclude land acquisition or sale, phased construction, capital financing, facility demolition or repurposing, LEED certification, geotechnical investigations, development charges, capital replacement, and HST. Also, soils investigation on site could have a significant impact to the costing and schedule of the works; the budget is based on shallow footing design.
4. All budget estimates are in 2012 Canadian dollars and one year escalation. Budgets for future years should be increased to account for such factors as inflation conditions in the construction industry.

In evaluating the options, it bears noting that Memorial Gardens, West Ferris, and Pete Palangio arenas are 58, 46, and 39 years old, respectively. A facility's age generally influences its cost of operation and can be used to determine the funds required to maintain the building in good repair. Buildings of this age are significantly more expensive to operate and maintain, making major capital investments a definite necessity in order to extend their useful life. Examples of improvements include component replacements, sustainability initiatives, accessibility upgrades, building code compliance, and improved functionality. Regardless of any facility refurbishment or expansion, significant funding will be required to keep the City's arenas safe and proper working order over the next few years. These costs will generally increase with time and unforeseen costs are an increased likelihood.

One metric for projecting future costs is provided by a study completed by Parks and Recreation Ontario in 2006 (Major Municipal Sport and Recreation Facility Inventory). For determining the capital funding requirements (lifecycle and capital improvements) for an arena that is 25 to 49 years old, this study estimated a cost factor of 50%. Based upon a generic replacement cost of approximately $10 million per community level ice pad, this means that **approximately $5 million could be required to maintain and upgrade West Ferris Community Centre and to extend its functionality into the foreseeable future (this figure would double to $10 million for Pete Palangio Arenas; due to the unique nature of Memorial Gardens, the cost to maintain/upgrade this facility over the long-term would likely be substantially higher).** Despite this sizable investment, there remains no guarantee of the facility's longevity given its age – once most community arenas approach 50 years old, they are replaced.

As a result, it is possible that the City will find that significant refurbishment and expansion of the Pete Palangio and West Ferris facilities is not financially feasible due to the high cost in comparison to building a new facility.

## 7.2 User Fee Review & Analysis

To facilitate the user fee review and analysis, the consulting team assembled fees and rates information from a variety of municipalities including neighbouring jurisdictions and communities similar in size to North Bay. The fee information was obtained from:

- East Ferris
- Trout Creek & Powassan (Powassan)
- South River
- Rodden (Mattawa)
- Warren
- Sturgeon Falls & Verner (West Nipissing)
- Sault Ste. Marie
- Timmins
- Greater Sudbury

The data was grouped and tabulated to compare prices charged to user groups and individuals that patronize each municipality's arena facilities. Input was also solicited and received from representatives of recreation departments in select jurisdictions to determine procedures, policies, or other practices that generally govern the establishment of user fees.

## North Bay Ice Rates

The City of North Bay employs a tiered fee policy whereby groups pay a premium for ice time at Memorial Gardens Arena. In 2011, adults paid approximately 10% more per prime time hour at Memorial Gardens than at Pete Palangio and West Ferris Arenas. There was a larger differential charged to youth groups per prime time hour (26%) between Memorial Gardens and the other two City ice facilities.

**North Bay 2011 Ice Rental Rates Including Taxes, Excluding Surcharge**

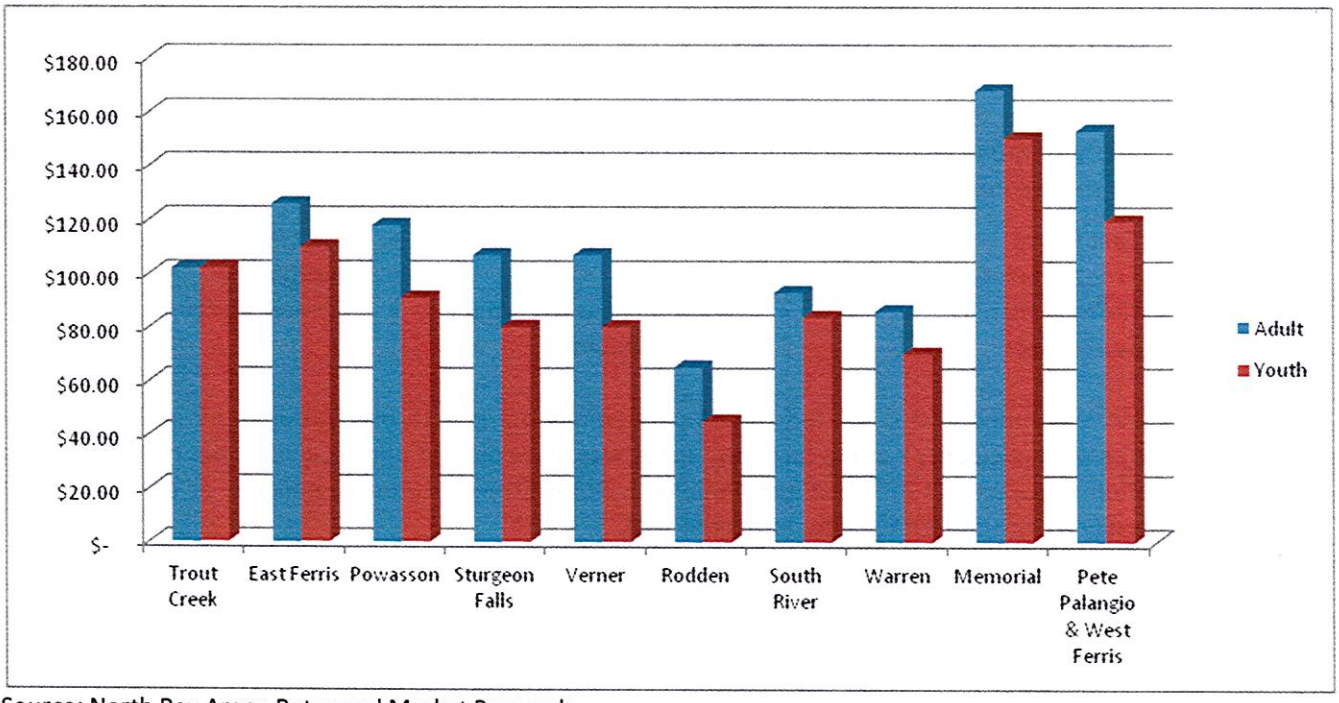
| | Prime Time | | Non Prime Time | |
|---|---|---|---|---|
| | Adult | Youth | Adult | Youth |
| Memorial Gardens | $ 168.26 | $ 150.39 | $ 78.74 | $ 64.43 |
| Pete Palangio & West Ferris | $ 153.15 | $ 119.49 | $ 78.74 | $ 64.43 |

Source: City of North Bay Fee Policy

## Local Fee Levels

Ice rates in North Bay are generally higher than in other local jurisdictions. On average, adults pay $112.54 per prime time ice hour (including taxes) while youth are charged an average of $93.16 per prime time ice hour. Next to North Bay, ice rates at the East Ferris Arena are the highest in the local market ($126/adult PT hour and $110/youth PT hour) whereas rates for the Rodden rink in Mattawa are the lowest of all local jurisdictions ($65/adult PT hour and $45/youth PT hour).

**Local Market Prime Time Ice Rates**




Source: North Bay Arena Rates and Market Research

### Similar Sized Communities

Ice rates in Greater Sudbury, Timmins and Sault Ste. Marie, are higher than prices charged in communities surrounding North Bay. Greater Sudbury is the only other municipality in the study that employs a tiered pricing strategy similar to North Bay's policy. According to municipal officials, the tiered differential reflects the quality of facility and the amenities available to users of the various arenas within each tier.

**2011 Ice Rental Rates – Municipalities of Similar Size to North Bay**

| | Prime Time | | Non Prime Time | |
|---|---|---|---|---|
| | Adult | Youth | Adult | Youth |
| Memorial Gardens | $ 168.26 | $ 150.39 | $ 78.74 | $ 64.43 |
| Pete Palangio & West Ferris | $ 153.15 | $ 119.49 | $ 78.74 | $ 64.43 |
| Greater Sudbury Tier 1 | $ 232.00 | $ 158.00 | $ 158.00 | $ 103.00 |
| Greater Sudbury Tier 2 | $ 220.00 | $ 145.00 | $ 145.00 | $ 103.00 |
| Greater Sudbury Tier 3 | $ 147.00 | $ 113.00 | $ 107.00 | $ 92.00 |
| Greater Sudbury Tier 4 | $ 255.00 | $ 170.00 | $ 203.00 | $ 136.00 |
| Sault Ste. Marie | $ 152.40 | $ 142.32 | $ 79.21 | $ 79.21 |
| Timmins | $ 151.42 | $ 77.97 | $ 103.00 | $ 69.00 |

Source: 2011 User Fee Policies in Each Jurisdictions (including taxes)

### Analysis of Prime Time Ice Rates

The average and median prime time ice rates were analyzed to determine the relative position of North Bay's price strategy compared to other municipalities included in the study. The focus of this analysis was on prime time rates because most user groups rent the bulk of their ice during these more desirable blocks of time.

The average was calculated by dividing the sum of all values by the number of rates in the data set – including North Bay's prices. The median represents the mid-point of each data set. The median was determined by ranking the values in order from highest to lowest and by selecting the value in the exact middle of values – with half the values above and half the values below. It is important to note that the median is less likely to be affected by a small number of unusually low or high values that may occur in a data set.

**Average and Median Prime Time Ice Rental Rates – Municipalities of Similar Size to North Bay**

| | Average Prime Time Rate | | Median Prime Time Rate | |
|---|---|---|---|---|
| | Adult | Youth | Adult | Youth |
| All Jurisdictions | $ 141.58 | $ 108.62 | $ 128.05 | $ 98.35 |
| Communities of Similar Size | $ 182.65 | $ 134.52 | $ 180.27 | $ 152.80 |
| Local Municipalities | $ 112.54 | $ 93.16 | $ 107.00 | $ 87.35 |

North Bay's ice rates at Pete Palangio and West Ferris Arenas are between 8% and 10% higher than the average of all ice user group fees included in the study. However, groups pay between 16% and 11% less for an hour of ice at these two facilities than the average ice rates at rinks in communities of the City's size. Conversely, North Bay's rates are the highest fees charged in the local market with prices ranging from 28% to 36% more than comparable rates at rinks in neighbouring jurisdictions. The comparison of North Bay's ice rates to the median of each data set revealed the same pattern of differences – although the City's rates are significantly higher than the median rates of the municipalities within the local market.

**Prime and Non-prime Time Price Differentials**

Understandably, the price to rent less desirable non-prime time ice is discounted in almost all jurisdictions. In North Bay, an hour of adult non-prime time ice costs 53% of the prime time rate at Memorial Gardens Arena and 49% of the prime time rate at Pete Palangio and West Ferris Arenas. Similarly, youth pay 57% of the prime time rate for each non-prime time hour at Memorial Gardens and 46% at Pete Palangio and West Ferris Arenas.

Similar non-prime time price discounts are employed in other jurisdictions. However, the analysis indicates that Greater Sudbury and Timmins are less generous in discounting the price of non-prime time ice. **According to input from municipal representatives, these pricing strategies have more to do with historical precedent than principles or policies guiding pricing decisions.** Furthermore, the investigations were unable to reveal any municipalities that establish prices in accordance with financial performance targets, such as cost recovery threshold.

**Prime and Non-prime Time Price Differentials**

| Municipality | Adult PT/NPT Price Differential | Youth PT/NPT Price Differential |
|---|---|---|
| Memorial Gardens | 53% | 57% |
| Pete Palangio/West Ferris | 49% | 46% |
| East Ferris | 44% | 35% |
| Powassan | 45% | 29% |
| South River | 46% | 40% |
| Greater Sudbury Tier 1 | 32% | 35% |
| Greater Sudbury Tier 2 | 34% | 29% |
| Greater Sudbury Tier 3 | 23% | 19% |
| Greater Sudbury Tier 4 | 33% | 20% |
| Sault Ste. Marie | 48% | 44% |
| Timmins | 32% | 12% |

**Priority on Youth**

Generally, children and youth are the priority of most recreation departments. It is, therefore, not surprising that all jurisdictions in this study charge youth groups less than adults for hourly ice rentals.

In North Bay, youth groups pay 11% less for each hour of prime time ice at Memorial Gardens than do adult groups. This discount is doubled (22%) for each hour of prime time ice at Pete Palangio and West Ferris Arenas. This pricing strategy is relatively similar to the differential between youth and adult rates charge by other municipalities in the study.

**Youth and Adult Price Differentials**

| Municipality | Prime Time Youth/Adult Price Differential | Non Prime Time Youth/Adult Price Differential |
|---|---|---|
| Memorial Gardens | 11% | 57% |
| Pete Palangio/West Ferris | 22% | 46% |
| Trout Creek | 0% | 0% |
| East Ferris | 13% | 35% |
| Powassan | 23% | 29% |
| Sturgeon Falls | 25% | 0% |
| Verner | 25% | 0% |
| Rodden | 31% | 100% |
| South River | 10% | 40% |
| Warren | 19% | 0% |
| Greater Sudbury Tier 1 | 32% | 35% |
| Greater Sudbury Tier 2 | 34% | 29% |
| Greater Sudbury Tier 3 | 23% | 19% |
| Greater Sudbury Tier 4 | 33% | 20% |
| Sault Ste. Marie | 7% | 44% |
| Timmins | 49% | 12% |

**Conclusions**

Based on the investigations and analysis of North Bay's ice rates, it is concluded that:

- the City's prevailing rate structure seems reasonable in terms of ice rates and the discount provided to both youth and non-prime time ice users;
- the tiered pricing strategy – reflecting facility quality and amenity differences available at Memorial Gardens Arena – is appropriate and should be maintained in the future; and
- future fee policies should take into account the quality of the arena facilities and should reflect physical improvements or amenity enhancements that may result from arena redevelopment decisions.

## 7.3 Operating Cost Analysis

The needs assessment indicated that North Bay should continue to maintain a supply of four indoor ice surfaces and that there is additional demand for two indoor sports fields. Physical deterioration of some arenas and design issues at others suggest that upgrades and/or replacement of one or more of the City's ice facilities is warranted. This report presents a number of options that would resolve the deterioration issues and, in certain instances, result in arena configurations that would improve operational efficiency.

This section provides an overview of the anticipated business and operating profile of the City's inventory of facilities as reflected in each of the potential redevelopment options. The financial projections related to the arena system are based on the City's current staff models and compensation grid, existing operating practices, prevailing ice rates and facility use profiles, and customary ancillary revenue production as well as anticipated adjustments necessitated by changes to the physical characteristics of the arenas as described in each option. The business plan elements for the indoor turf facility are based on comparable facilities operated by municipalities in other jurisdictions.

**Existing Arena Revenue Profile**

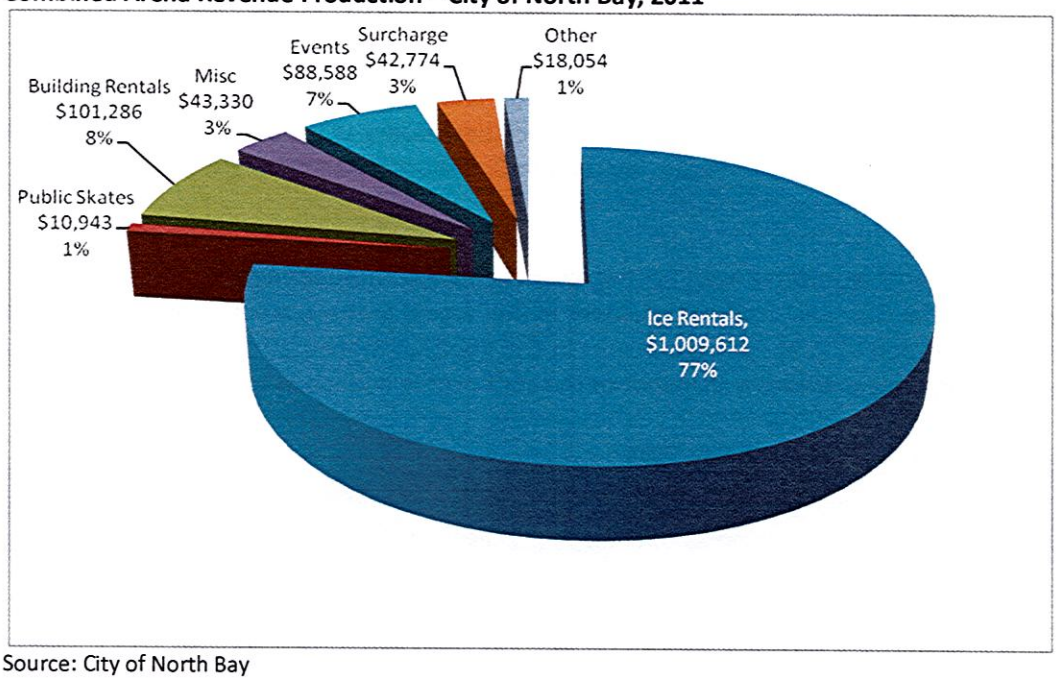
As the City's premier ice facility, Memorial Gardens Arena is utilized for a variety of purposes including community and user group rentals, City programs (public skating), events, Junior and Varsity hockey programs and miscellaneous rentals. Although ice rentals represent the largest portion of Memorial Gardens' annual revenue, events and building rent produces a more significant amount of revenue than is the case at either of the City's other two ice facilities.

West Ferris and Pete Palangio Arenas primarily serve as community rinks with the majority of each facility's revenue streams arising from user group ice rentals. Pete Palangio offers ice users two sheets of summer ice and, therefore, generates disproportionately higher annual ice rental income.

Across the arena system, almost seven of ten rented ice hours (66%) are occupied by youth groups which is an important revenue influencer because the youth rental rate is 22% lower than the rate charged to adult groups. Given that youth will continue to receive priority ice allocation for the foreseeable future, the revenue implications of the lower rental rates should be factored into future user fee policies.

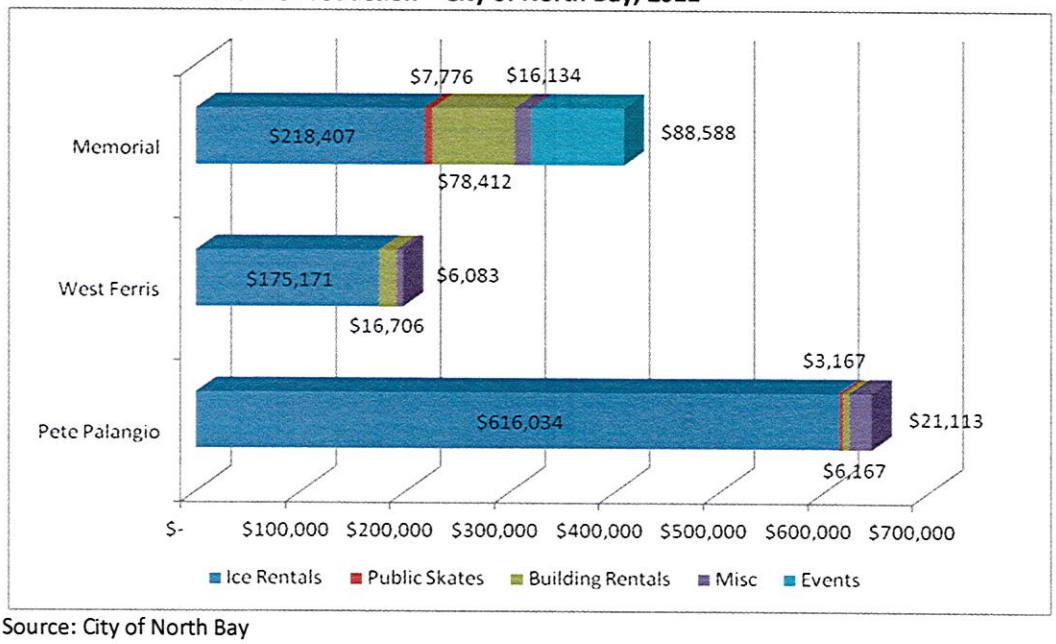
In 2011, the arena system generated slightly more than $1.314 million in gross revenue, 77% of which arose from ice rentals. Similar revenue levels and income source profiles were observed in the two preceding years.

**Combined Arena Revenue Production – City of North Bay, 2011**




Source: City of North Bay

**Individual Arena Revenue Production – City of North Bay, 2011**




Source: City of North Bay

## Existing Arena Staffing Profile

The City's three ice facilities conform to a common staff deployment model with minor modifications in response to the operating nuances of each location. Over and above the payroll cost related to operating staff at the facilities, the Manager Arena and Facilities' salary is divided equally across the three rinks. Additionally, one-third of the Parks, Recreation & Leisure Director's salary is allocated to Memorial Gardens.

To meet the staff requirements associated with hosting events and accommodating a significant number of building rentals, Memorial Gardens' staff complement is the largest in the system. And, the twin ice surfaces and summer operation at Pete Palangio results in the need for more staff than are deployed at West Ferris. The following table provides a snapshot of the staff profile at each of the City's ice facilities.

**Arena Staff Deployment Profile – City of North Bay, 2011**

| Position | Full Time Equivalent Staff Positions at each Rink | | |
|---|---|---|---|
| | Memorial Gardens | Pete Palangio | West Ferris |
| Parks, Recreation & Leisure Director | 0.33 | - | - |
| Manager Arena and Facilities | 0.33 | 0.33 | 0.33 |
| Supervisor | 0.75 | 0.5 | 0.5 |
| Clerical | 2 | 1.75 | - |
| Maintenance | 6 | 3.5 | 3.5 |
| Rink Attendants | 6 | 3 | 3 |
| Skate Patrol | - | 2 | - |
| Evening Office | - | 3 | 2 |
| Event Supervisor | 1 | - | - |
| Event Staff | 15 | - | - |
| Bar Staff | 5 | - | - |
| Box Office | 5 | - | - |
| Public Address Technician | 1 | - | - |
| Time Keeper | 3 | - | - |

Source: City of North Bay

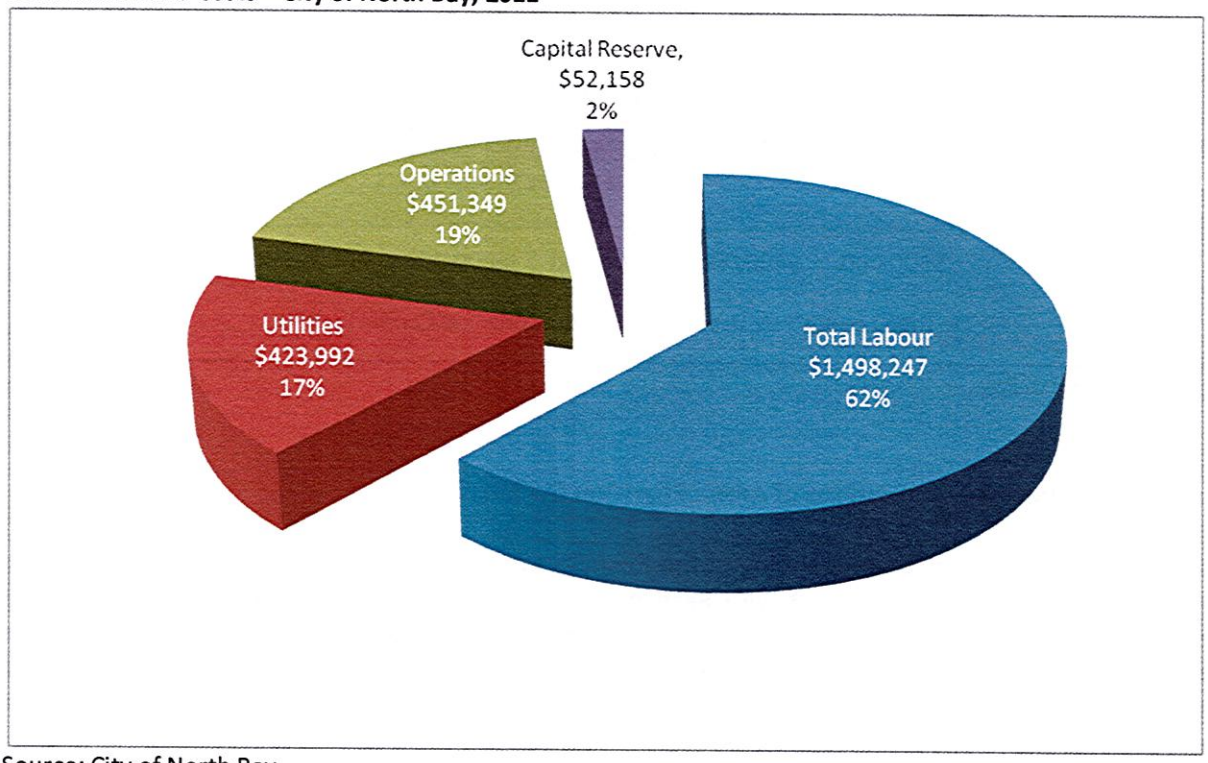
## Existing Arena Expense Profile

As is normally the case with arena operations, payroll represents the most significant cost item associated with North Bay's arena system. As a general industry guideline, the staff cost ratio metric for ice facilities usually falls within a range of about 50% to 60% of an arena's total cost structure. The city-wide arena staff cost ratio is slightly higher than the industry metric (62%) which is likely due to the rinks receiving an allocated expense equivalent to a proportion of the salaries of the Parks, Recreation & Leisure Director and Manager Arena and Facilities – an expense burden that is not included in the industry staff cost metric. Also, two of the City's rinks – representing 50% of the arena inventory – are single pad configurations that are unable to take advantage of labour cost efficiencies associated with multi-pad rinks.

Utility expenses at the City's rinks – hydro, gas and water – are the second largest single cost items (17%), which is entirely consistent with industry norms. Community arenas generally operate within a utility cost range of between $2.25 and $3.00 per square foot of arena space. This utility cost metric will be influenced up or down by the facility's age, the life cycle stage of the refrigeration equipment and other mechanical and plant items, size of the facility and the number of ice surfaces at a common location, the presence of energy efficient technologies, operating profile (hours of operation, ice thickness and ice hardness), as well as the provision of summer ice. From a utility perspective, West Ferris is the most economical arena in the system with an average annual utility expense of $2.53 per square foot. While Pete Palangio arena runs at a utility cost ratio of $3.44 per square foot, the facility's age and summer ice schedule would likely be at the root of a utility consumption rate beyond levels experienced by newer twin pad arenas and especially those that operate only in the winter months.

Given Memorial Gardens' stadium configuration (including its high ceilings, wide concourses and large spectator seating areas), it is understandable that the Garden's energy consumption would be higher than a typical community arena – Memorial Gardens runs at $3.12 per square foot in utility costs. Additionally, staff report that Memorial Gardens' boiler system is relatively inefficient and problematic, especially during the fall start-up period, which would also contribute to an increase in utility consumption.

**Combined Arena Costs – City of North Bay, 2011**

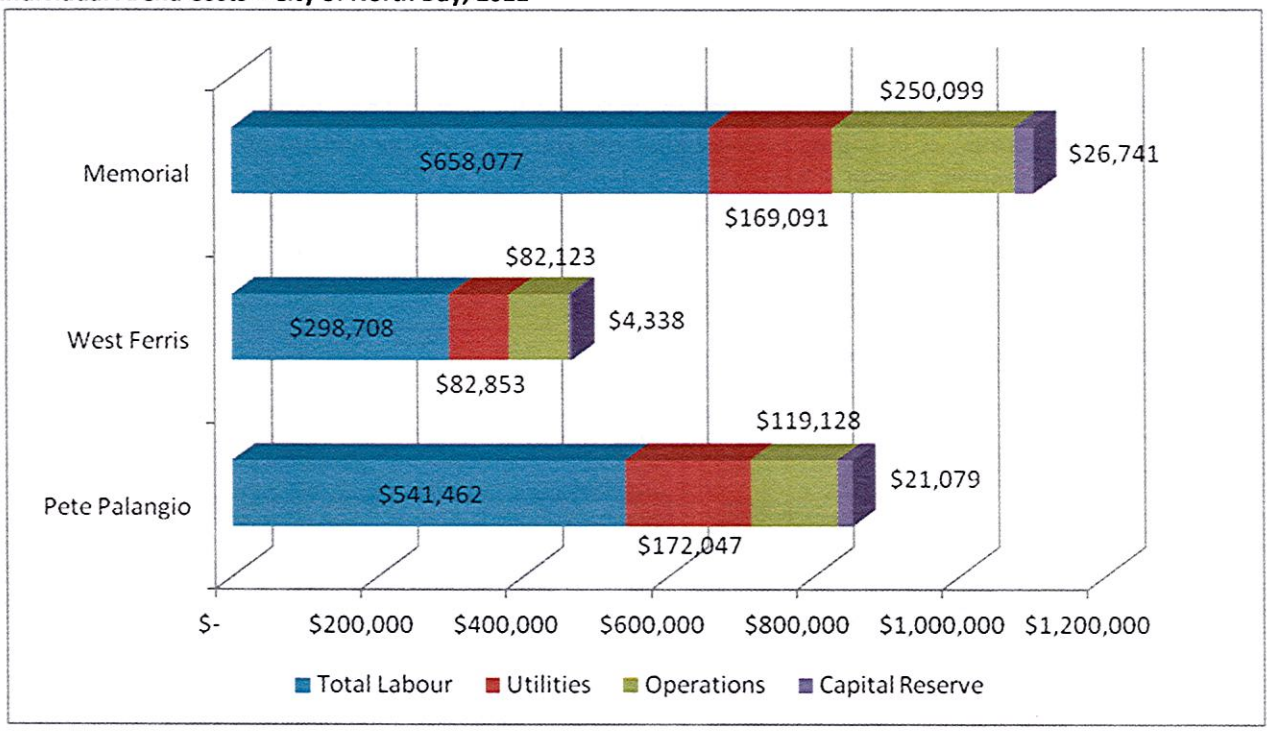



Source: City of North Bay

To simplify the presentation of the arena system's financial performance, all other cost items have been grouped under the heading of operations (19%). As part of the financial analysis, items contained within the 2011 operating statements were reviewed and no notable abnormalities were found.

As reported by staff, North Bay attributes an annual capital reserve contribution to each arena. It is understood that the reserve funds are used to underwrite the cost of unscheduled capital repair and maintenance items. As facilities age, they are more expensive to operate and maintain. Therefore, North Bay should budget proportionally higher capital maintenance funds than communities with a relatively newer stock of assets. Additionally, in the absence of significant capital redevelopments or retrofits, an older facility's maintenance needs and associated costs will continue to escalate, placing increased pressure on capital and operating budgets. This circumstance is certainly evident in the case of North Bay's aging arenas.

**Individual Arena Costs – City of North Bay, 2011**




Source: City of North Bay

**Operating and Financial Implications of Arena Provision Options**

To provide the City with an understanding of the financial implications of each facility provision option, the operating consequences inherent with each option have been reviewed, along with the cost or revenue factors associated with the City's current operating profile. Additionally, certain aspects of the operating circumstance have been adjusted in accordance with the manner in which similarly configured arenas operate in other jurisdictions. In combination, these factors have been used as assumptions that are the basis for the financial projections.

It is noteworthy that the projections reflect only the operating implications of each alternative. While the financial models do take into account the City's current practice related to each arena's annual operating reserve allocation, the forecasts do not include the financial implications of a capital repair or replacement fund that would be used to underwrite major facility or equipment failures or replacements in the future.

Further, the forecasts do not include any new revenue streams, such as contract services (e.g., restaurant), space leases, or other forms of revenue-producing partnerships. The City should consider partnerships that provide potential revenue-related and community benefits prior to upgrading or constructing recreational facilities (refer to Section 8.1).

A summary of the elements of each redevelopment or replacement option, as well as the associated assumptions, are presented in the following subsections. A summary of the financial implications of each option appears in the table presented at the end of this section.

Option A1 – Upgrade the Existing Arena Inventory

This option contemplates significant upgrades to each of the three facilities including:

- Memorial Gardens – expand the ice surface, upgrade the seating and change facilities.
- Pete Palangio Arena – expand the ice surfaces, build new change rooms and generally update the building.
- West Ferris Community Centre – expand the ice surface, upgrade the change rooms and lobby.

The upgrades would result in an expanded footprint of each arena as presented below.

**Space Implications of Option A1 Upgrades (estimated)**

| | Memorial Gardens | Pete Palangio | West Ferris | Combined Total |
|---|---|---|---|---|
| Current sq. ft. | 54,229 | 50,000 | 32,748 | 136,977 |
| Estimated Sq. ft. after Upgrades | 62,229 | 59,500 | 37,098 | 158,827 |
| Incremental Size Increase (sq.ft.) | 8,000 | 9,500 | 4,350 | 21,850 |

The assumptions that are the basis for the financial projections of this option are:

- The enhancements and incremental size increase at Memorial Gardens should not result in the need for additional staff.
- Utility costs at Memorial Gardens would increase proportionate by the 15% rise in the square footage of the building.
- Memorial Gardens' operating cost would climb by 10% because of the larger building and upgrades to service levels consistent with the renovated facility.
- In view of the City's capital investment in enhancing and physically upgrading Memorial Gardens, it is assumed that the municipality could increase facility rental, surcharge and event prices by 10% and, therefore, would realize equivalent revenue gains in these areas – price increases or related revenue gains in ice rentals or public skating have not been assumed.
- Pete Palangio's utility costs would increase proportionate by the 19% rise in square footage of the building.
- Pete Palangio's operating costs would climb by 8% on account of a larger building.
- Utility costs at West Ferris would increase proportionate by the 13% rise in square footage of the building.
- West Ferris' operating costs would climb by 6% because of the larger building.

Option A2 – Replace Pete Palangio Arena with a New Twin Pad Arena

This option contemplates decommissioning Pete Palangio Arena and replacing it with a new twin pad facility. Based on a preliminary design concept, it is assumed that the new rink would be 79,000 square feet which is 58% larger than the existing 50,000 square foot twin pad facility.

The assumptions that are the basis for the financial projections of this option are:

- The staffing profile of the current twin pad facility would be replicated in the new facility and hence there would be no change in payroll costs.
- Utility consumption in the new facility would benefit from modern technologies and energy efficiencies that are not inherent in the City's existing twin pad arena and, therefore, utility costs have been projected at $2.50 per square foot.
- Operating costs have been increased by 20% because of the increased facility footprint.
- The revenue and cost projections assume that the new facility would accommodate the summer ice program currently offered at Pete Palangio Arena.
- In view of the upgrade to the facility, it is assumed that the City could increase ice rental rates by 20% at the new twin pad rink – this would bring rates closer to Memorial Gardens' rates. It is also assumed that building rental rates will be raised by 20%.

Option A3 – Replace West Ferris Community Centre

This option contemplates decommissioning West Ferris Community Centre and replacing the ice surface by adding a new pad to Memorial Gardens (the Gardens would become a twin pad facility). Based on a preliminary design concept, the new twin pad rink would be 104,729 square feet representing an incremental increase of 50,500 square feet from the existing Memorial Gardens Arena. Given that West Ferris would be removed from service, this option means that the total space in the entire arena system would climb by 17,752 square feet compared to the combined space in the existing system.

The assumptions that are the basis for the financial projections of this option are:

- The addition of the second ice surface to Memorial Gardens would require increasing the maintenance personnel component of the staff complement by one full-time arena maintenance person (at $64,289 including benefits) and two part-time maintenance personnel (at $48,217 each including benefits).
- The blended utility cost at the twin pad facility would be $2.65 per square foot – assuming that modern energy saving technologies would be built into the new construction.
- Operating costs would climb by 10% because of the increased facility footprint and the introduction of the second ice surface.
- Capital reserve contribution would be increased by 100% because Memorial Gardens would take on the contribution traditionally allocated to West Ferris.
- Rental rates for ice time on the new ice surface would increase to the existing rates charged at Memorial Gardens – an overall climb of approximately 20%.
- Building rental rates would climb by 20% in view of the overall upgrades to the facility.

Option A4a – Replace Pete Palangio and West Ferris Community Centre (1 quad pad arena)

The first alternative for this option contemplates replacing Pete Palangio Arena and West Ferris Community Centre by adding three new ice services to Memorial Gardens – whereby Memorial Gardens would become a four pad facility. Based on a preliminary design concept, the new four pad rink would be 181,229 square feet representing an incremental increase of 127,000 square feet from the existing Memorial Gardens Arena. Given that Pete Palangio and West Ferris would be removed from service, this option would mean that the total space in the new arena (which would represent North Bay's entire arena system) would be 44,252 square feet larger than the combined space of the existing system.

The assumptions that are the basis for the financial projections of this option are:

- The addition of the three new ice surfaces to Memorial Gardens would require increasing the maintenance personnel component of the staff complement by the equivalent of 3.5 full-time arena maintenance persons (at $64,289 each including benefits) and four part-time maintenance personnel (at $48,217 each including benefits).
- The blended utility cost at the four pad facility would be $2.50 per square foot – assuming that modern energy saving technologies would be built into the newly constructed facilities.
- Operating cost would climb by 50% because of the increased facility footprint and the introduction of the three ice surfaces. This increase reflects the economies of scale savings associated with operating a quad-pad arena compared to single or twin pad configurations.
- Capital reserve contribution would be increased by 200% because Memorial Gardens would take on the contribution traditionally allocated to West Ferris and Pete Palangio Arenas.
- The revenue and cost projections assume that the new quad-pad facility would accommodate the summer ice program currently offered at Pete Palangio Arena.
- Rental rates for ice time on the new ice surfaces would increase to the existing rates charged at Memorial Gardens – an overall climb of approximately 20% of the time transfer from West Ferris and Pete Palangio.
- Building rental rates would climb by 20% in view of the overall upgrades to the facility.

Option A4b – Replace Pete Palangio and West Ferris Community Centre (two twin pad arenas)

The second alternative for this option contemplates replacing West Ferris Community Centre by adding a new pad to Memorial Gardens – whereby the Gardens would become a twin pad facility and by decommissioning Pete Palangio Arena and replacing it with a new twin pad facility at another location (tbd). This alternative represents a combination of options A2 and A3 and would result in North Bay's arena system including two twin pad facilities. As stated above, the new twin pad that replaces Pete Palangio would be 29,000 square feet larger than the existing facility. The new twin pad at Memorial Gardens would be 50,500 square feet larger than the current Gardens structure. Given that both Pete Palangio and West Ferris would be removed from service this alternative would mean that the total space in the entire arena system would climb by 46,752 square feet compared to the combined space in the existing system.

The assumptions that are the basis for the financial projections of this option duplicate the assumptions presented above in options A2 and A3.

Observations and Summary of Financial Implications

The financial implications of each redevelopment or replacement alternative will vary in accordance with a number of common influences:

- Alternatives that include enhancements to existing facilities that result in increases to the size of the building's footprint will consume proportionally more energy and, therefore, utility costs will climb above the current expenditures.
- Alternatives that include combining a single pad facility with another rink – thereby creating a new multiple pad facility – will benefit from order of magnitude savings related to payroll, utility and operating expenses. Expectedly, twin pad facilities are more economical than single pad rinks and quad-pad arenas cost proportionally less to operate per ice surface than twin pad facilities.
- Facility upgrades and consolidation will create an opportunity for the City to increase user fees to reflect enhancements to the arena inventory while remaining within the general range of fees charged for comparable facilities in other jurisdictions of North Bay's size. This change will help to increase revenue streams from the affected facilities.

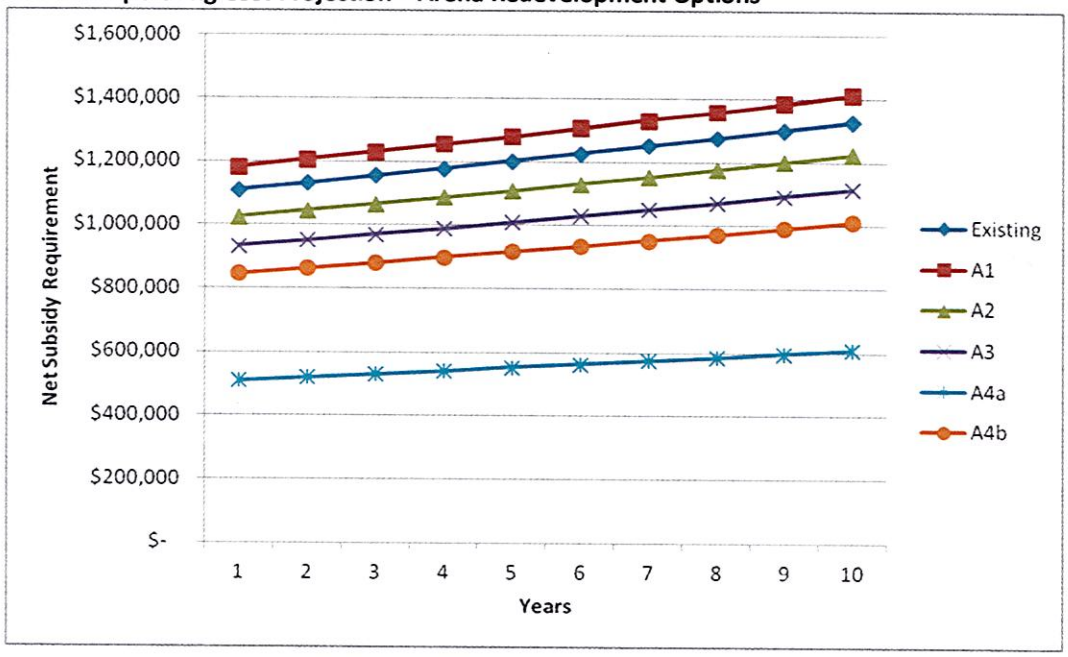
The following table illustrates the financial implications of each redevelopment or replacement alternative described above. The cost and revenue projections are presented in a summary format so that the City can appreciate the overall financial impact of each option on the arena system at large.

**Financial Implication Summary of Arena Redevelopment Options**

| Options | Existing | A1 | A2 | A3 | A4a | A4b |
|---|---|---|---|---|---|---|
| Description | Existing Facilities (2011) | Upgrades to all Existing Facilities | Replace Palangio with a New Twin Pad | Replace West Ferris (twinning of Memorial) | Replace Palangio and West Ferris (quad at Memorial) | Replace Palangio and West Ferris (twin Memorial and build another twin) |
| Arenas in Operation | Memorial (1)<br>Palangio (2)<br>W. Ferris (1) | Memorial (1)<br>Palangio (2)<br>W. Ferris (1) | Memorial (1)<br>W. Ferris (1)<br>New Twin (2) | Memorial (2)<br>Palangio (2) | Memorial (2) | Memorial (2)<br>New Twin (2) |
| Arena System Combined Sq. Ft. | 136,977 | 158,827 | 165,977 | 154,729 | 181,229 | 183,729 |
| Expenses: | | | | | | |
| Labour | $1,498,247 | $1,498,247 | $1,498,247 | $1,360,262 | $1,075,957 | $1,360,262 |
| Utilities | $423,992 | $491,159 | $449,445 | $449,579 | $453,073 | $475,032 |
| Operations | $451,349 | $490,817 | $475,175 | $394,237 | $375,149 | $418,062 |
| Capital Reserve | $52,158 | $52,158 | $52,158 | $74,561 | $80,223 | $74,561 |
| **Total Expenses** | $2,425,747 | $2,532,381 | $2,475,025 | $2,278,639 | $1,984,401 | $2,327,917 |
| **Total Revenue** | **$1,314,587** | **$1,336,665** | **$1,439,027** | **$1,352,962** | **$1,477,403** | **$1,477,403** |
| **Net Cost** | **$1,111,160** | **$1,195,715** | **$1,035,998** | **$925,676** | **$506,998** | **$850,515** |
| Net Change | | **$84,556** | **-$75,162** | **-$185,483** | **-$604,162** | **-$260,645** |

The following chart reflects the relative impact on the annual operating subsidy requirement of each option if the City were to raise revenues at a rate consistent with operating cost increases caused by inflation (this example assumes a 2% annual escalation in both revenue and costs). Only Option A1 would require more funding support than the existing arena circumstance. Purely from an operating perspective, Option A4a it is by far the most cost effective approach.

**Ten Year Operating Cost Projection – Arena Redevelopment Options**




## Operating and Financial Implications of Indoor Turf Facility Provision Options

The needs assessment portion of the study indicates that there is demand for two indoor sports fields (approximately 100' by 200' each) that would be used by a variety of sport groups. The facility would be a multi-field venue in one location.

This report suggests that a turf facility would ideally be provided in partnership with a local organization or the education sector. The size, construction type, location and operating profile of the facility will depend on the terms and conditions of a partnership with the third party entity.

At this juncture it is impossible to predict the type of relationship that could arise through discussions with potential partners. Therefore, for the purposes of this business plan, it is assumed that the facility would be municipally managed and that the City would employ operating practices similar to the operating profile of its arena inventory – i.e., the Department would rent blocks of time to the various turf field user groups. The allocation process would be undertaken by City staff and conform to procedures applied to other types of municipal facilities – arenas, fields, diamonds, etc. Groups will be free to organize their own leagues and deliver programs targeting the needs of their constituents. The City would receive revenue from field rent and the groups would retain net revenue generated by programming. The City would also be responsible for all operating costs associated with the facility.

A summary of the operating implications and the associated financial assumptions for the two indoor field provision options are presented in the following subsections. A summary of the financial implications of each option appears in the table presented at the end of this section.

Option B1 – Install a Bubble over an Artificial Turf Field

This option contemplates that an air supported dome structure capable of accommodating two 100' by 200' fields would be installed over a new artificial field – presumably a portion of full football or soccer field. It is assumed that the bubble facility would operate seasonally – i.e. an indoor configuration from October 15 to April 15 each year representing a 26 week indoor season. The field would revert to an outdoor environment during the spring and summer months.

The assumptions that are the basis for the financial projections of this option are:

- The facility will be available for rental between 7:00 am and 11:00 pm Monday through Sunday. For the purposes of revenue calculations, the following prime and non-prime time definitions are assumed: Weekday Prime Time Hours – 5:00 pm to 10:00 pm; Weekday Non-prime time Hours – 7:00 am to 5:00 pm; and Weekend Prime Time Hours – 7:00 am to 10:00 pm.
- Existing Department personnel will assume the responsibilities of allocating and scheduling time to each group and the normal facility rental procedures will be applied. As it is difficult to accurately estimate the amount of additional staff time the will be required to administer the field scheduling, etc. for the new facility, Departmental administration expenses have not been included in the business plan's operating cost projections.
- A customer service/reception area in a building adjacent to the bubble would be supervised during all prime time hours of the indoor season to ensure that facility traffic is controlled and that users have access to consistent levels of customer service. It is assumed that the supervision will be undertaken by part-time, casual staff who will be engaged on a seasonal basis. The staffing plan also assumes that personnel will supervise the facility during rented non-prime hours.
- Sample field rental rates have been established to illustrate the revenue implications of the business plan's assumptions. Should the project proceed, the City's actual pricing should take into account additional consultation with the facility's potential user groups. Therefore, the illustrative rates are presented for demonstration purposes only and should not be considered as a recommended or a final price strategy.

**Illustrative Adult and Youth Field Rental Rates – Winter Season**

| Time Period | Adult Groups and Individuals | Youth Groups and Individuals |
|---|---|---|
| Hourly Prime Time Rental Rate | $150.00 | $112.50 |
| Hourly Non-Prime Time Rental Rate | $120.00 | $90.00 |

- There will be 60 hours of prime time available on each field, each week of the 26 week season. Based upon the demand analysis, it is estimated that 75% of prime time hours will be rented.
- Non-prime time use of indoor turf facilities is generally sporadic and limited. For this reason, it is projected that 5% of the 45 non-prime time hours on each field will be rented each week.
- The turf facility would accommodate the program requirements of a variety of user groups, some of which cater to the needs of youth participants while others involve adults. Although it

has been assumed that the field allocation process will conform to the City's customary allocation and scheduling practises, at this point in the planning process it is difficult to accurately predict the proportion of time that will be ultimately assigned to youth vs. adult groups. Therefore, to provide a conservative revenue projection, forecasts have been based on the youth rates – meaning that revenues could improve by about 25% for each hour rented to adult users.

- The proposed operating profile does not contemplate that the City will undertake any programming activities at the facility. Furthermore, the adjacent building would not be outfitted to offer retail or food and beverage services – these are sometimes available in other indoor turf venues. Therefore, field rent is the only revenue source anticipated for the facility.
- It is assumed that the City would implement a relatively low-cost operating profile for the bubbled turf facility. In keeping with this approach, the staff deployment strategy contemplates on-site supervision of the building during the facility's prime time hours as well as rented hours during non-prime time periods. The projected labour cost is based on staff coverage for 3,380 hours over the 26 week season. The payroll cost estimates are based on the City's current wage rate for an arena maintenance person II ($32.97/hour including benefits). The supervision time allocation allows for 1.5 FTE staff to be on-site during all prime time hours and rented non-prime time hours and, therefore, light cleaning duties and equipment surveillance can be accommodated within the labour budget.
- The utility expense projection for the bubble option is based on the anticipated level of consumption of natural gas and hydro-electric energy multiplied by a price per unit of each commodity – i.e. by kilowatt hour of electricity and cubic metre of gas. It should be noted that utility consumption can be influenced by a number of uncontrollable factors including location of the structure, insulation factor, outside temperature, barometric pressure and weather conditions (wind). Additionally operating procedures such as preferred in-use temperature, facility traffic, non-use temperature, air pressure settings, security practices, etc. can have a positive or detrimental effect on energy consumption. In combination, these factors cause each dome structure to have unique characteristics and distinctive qualities that will impact utility costs. Furthermore, uncontrollable influences that have energy consumption consequences – such as a very cold and windy winter – can cause significant fluctuations between operating years of the same bubble.
- Annual bubble installation and take down expense, which includes a contingency for storage, is based upon estimates provided by a bubble manufacturer.
- The estimated cleaning/janitorial expense takes into account cleaning strategies and related costs at comparable bubble examples. It is assumed that the on-site City supervisory staff will undertake light cleaning duties as part of their daily operating routine. The business plan's estimated cleaning expense would support about 1.5 hours per day of supplementary janitorial services in the bubble based on the City's wage and benefit rates.
- Other general operating costs include telephone/internet/communications, general and equipment maintenance, turf maintenance and miscellaneous expenses. The estimate for each expense item is based on comparable bubble operations.
- The financial forecasts include a capital reserve contribution that will be applied to the replacement of the field turf. The reserve contribution is based on the estimated cost of replacing the turf after eight years of service.

- The financial forecasts include a capital reserve contribution that will be applied to replacing the bubble membrane. The amount of the contribution is based on the estimated cost of replacing the membrane after 15 years of service.
- The financial model assumes that during the summer months, the turf field would be included in the City's inventory of outdoor fields and, therefore, does not include any revenue or costs related to the field while in its outdoor configuration.

Option B2 – Build a Permanent Indoor Turf Facility

This option contemplates the construction of a permanent indoor turf facility possibly in the form of a pre-engineered structure. The facility could be connected to a new or existing arena to create a multi-use recreation facility – MURF. It is anticipated that the City's management and operating approach for the permanent facility would be consistent with the operating profile details described above.

Many of the assumptions that have been developed for the bubbled turf facility would apply to the permanent facility with the exception of the following:

- The facility would offer indoor turf field rentals 12 months of the year. The definitions of prime and non-prime time and the price structure would be the same as the bubbled facility for the winter season. It is noteworthy that operators of other year round turf venues report significant difficulty in renting indoor turf time during the summer months. Therefore, it is assumed that the City would adjust the summertime rental rates as follows.

**Illustrative Adult and Youth Field Rental Rates – Summer Season**

| Time Period | Adult Groups and Individuals | Youth Groups and Individuals |
|---|---|---|
| Hourly Prime Time Rental Rate | $75.00 | $56.25 |
| Hourly Non-Prime Time Rental Rate | $60.00 | $45.00 |

- As mentioned above, summer time utilization will be much lower than winter field use. Based on input from other permanent indoor field turf operators, it is estimated that 40% of prime time summer hours will be rented. It is also projected that 5% of the 40 non-prime time hours on each field will be rented each week in the summer.
- It is assumed that the permanent facility would operate under the same low-cost staff deployment model as was described for the bubble facility – i.e., supervision by 1.5 FTE staff at the facility during all prime time hours and rented non-prime time hours. Although this may be a generous supervision allocation if the facility is located adjacent to an arena and is therefore able to take advantage of cross staffing, the intent is to be conservative in these cost projections. The same wage rate as identified above has been maintained.
- Utility costs have been estimated at $2.00 per square foot for the 56,000 square feet of facility space – which is consistent with other comparable indoor turf examples.
- All other operating costs have been adjusted to reflect an indoor environment and a 12 month operating season.
- The turf replacement reserve has been calculated based upon the same assumptions as presented in the bubble option.
- The operating capital reserve contribution is similar to the $25,000 contribution that the City applies to its arena facilities.

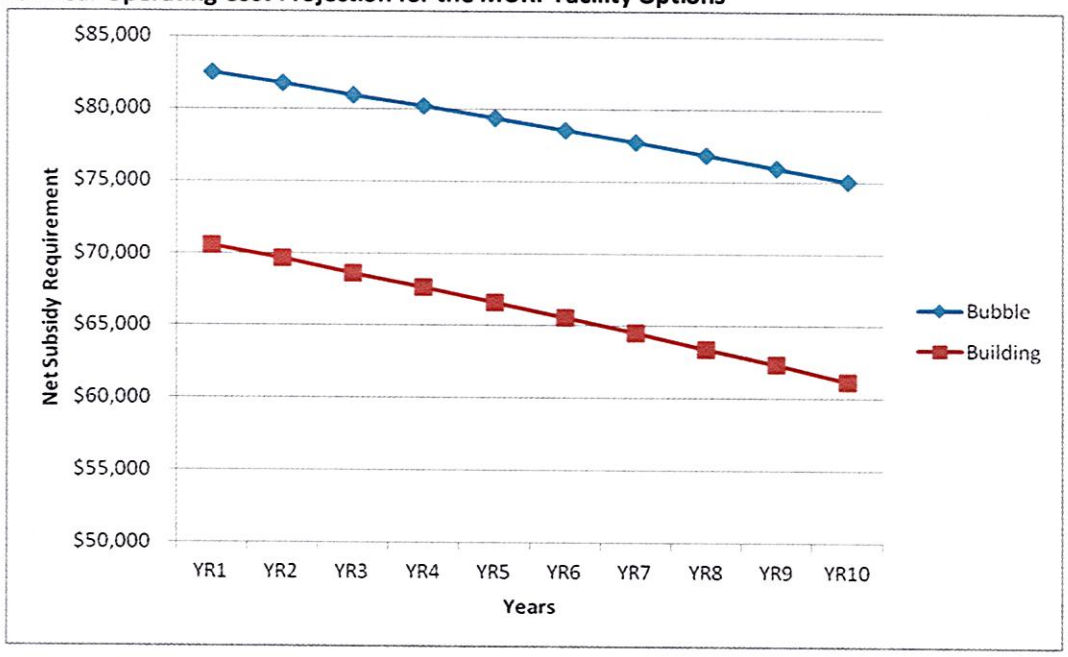
The following table presents the financial implications of the bubbled and the permanent indoor field turf options based upon the assumptions presented above.

**Financial Implication Summary of Indoor Turf Facility Development Options**

| | B1 Bubble | B2 Permanent Building |
|---|---|---|
| **Revenue** | **$273,780** | **$349,245** |
| Expenses: | | |
| Labour | $80,040 | $160,080 |
| Utilities | $90,700 | $12,000 |
| Cleaning/Janitorial | $8,000 | $16,000 |
| Telephone | $2,000 | $4,000 |
| General/Equipment Maintenance | $2,500 | $5,000 |
| Turf maintenance | $1,500 | $2,000 |
| Misc. | $1,000 | $2,000 |
| Installation/Take Down/Storage | $50,000 | n/a |
| Turf replacement (Reserve) | $93,750 | $93,750 |
| Bubble/Building Replacement (Reserve) | $26,764 | $25,000 |
| **Total Expense** | **$356,254** | **$419,830** |
| **Net Cost** | **$82,474** | **$70,585** |

Applying the same revenue and operating cost escalation assumptions to the two potential indoor turf facility options has the opposite effect on the annual subsidy requirements compared to the arena options. In large part, this is because both facilities' projected revenues are greater than the projected variable expenses in each of the ten years in the forecasted period. This means that revenue gains from the 2% annual fee increase will exceed cost growth caused by inflation (based on the same 2% escalation rate). Fixed costs for capital reserve contributions – which would fund future turf and facility replacement – will have a neutral effect on the subsidy needed over the projection period.

**Ten Year Operating Cost Projection for the MURF Facility Options**



## 7.4 Funding Considerations

**Funding the Capital Costs**

Given that the scope of the MURF project (even if phased) is larger than the City's current financial reserves, other sources of funding will be required to cover the full cost of the facility's development. These may include (but not be limited to) grants, debt financing, development charges user fees and capital surcharges, partnerships and sponsorships, fundraising and/or other initiatives. Several of these items are discussed in more detail below.

Some municipalities have had success in developing relationships with outside entities interested in facilitating the development of facilities. Occasionally philanthropic contributions help to pay for community projects. Sometimes, civic minded companies or individuals can be persuaded to "kick start fund raising campaigns" with generous donations. While in other situations municipalities have created partnership or sponsorship agreements with organizations that see benefit in being associated with a particular municipal facility or service. Each of these funding options is generally driven by local circumstances and is usually specific to a particular project or service.

Reserves

The City maintains a capital reserve account for each arena facility; monies from these accounts are used for various capital repairs and upgrades. As of June 20, 2012, there was approximately $334,000 in these accounts that would be eligible to be used toward the repair, renovation, or replacement of the City's arena infrastructure. It may also be possible to direct any proceeds from the potential sale of redundant facilities to offset future recreational infrastructure.

Development Charges

Development charges (DCs) collected from the development community can be applied towards recreation facilities required to meet growth related needs. The City currently has a modest Development Charge reserve that is shared amongst all parks and recreation infrastructure. It should be noted that DCs cannot be used to fund replacement infrastructure offering the same level of service (and would not apply to the arena projections), but could be available for an indoor turf facility or indoor track.

Grants

Major municipal capital projects often receive financial support from senior levels of government. In 2009, the Federal and Provincial governments announced significant one-time grant programs (Build Canada Fund, Economic Stimulus Fund, and Recreation Infrastructure Canada) aimed at renewing aging infrastructure, including parks and recreation. This funding was successfully leveraged by many communities and has resulted in several new and enhanced facilities across the province.

Recently, the Federal Government announced the Community Infrastructure Improvement Fund, which will provide $150 million for the repair and improvement of community infrastructure facilities across the country; of this amount, $49.6 million has been earmarked for Ontario. Municipal community and recreational facilities, including arenas, are just some of the types of infrastructure that are eligible under this program. To be eligible, the project must involve the rehabilitation, improvement, or

expansion of an existing facility and construction must be completed by March 31, 2014. Priority will be given to projects that can demonstrate anticipated economic benefits to their communities and the use of new technologies and innovation. Funding recipients may receive up to 50% of total eligible costs to a maximum of $1 million per project. The first application intake is occurring in Fall 2012 and the second and final intake is schedule for early 2012.

Presently, there are no formal provincial or federal infrastructure programs from which municipalities are able to receive financial assistance to develop new sport and recreation facilities. While it is not currently known when the next significant recreation infrastructure funding program will begin, it is unlikely that another formal capital program is on the short-term horizon. Consequently, for the next several years it is quite probable that municipalities will be required to develop new recreation facilities in the absence of federal or provincial financial assistance.

Financing

The final funding option would be to finance the development – however, this is the most expensive alternative.

Other than the capital cost of the project, the two key variables that determine the cost of financing a project are the interest rate and the term of the amortization period over which the project is financed. Interest rates are largely dictated by the prevailing economic conditions and the associated lending rates. For demonstration purposes, a 5% interest rate is assumed in projecting the financing costs.

Municipalities choose amortization periods based upon their financial capacities to handle capital repayment schedules as well as the nature of the project that is to be financed. Frequently, these decisions are tied to the anticipated useful life of the capital project. In general terms, recreation centres have useful lives of 30 or more years. Consequently, an appropriate amortization period would be up to 20 years.

In the absence of funds from other sources, the City would be required to underwrite the entire capital cost of arena and recreation facility redevelopment and/or development. Two scenarios are presented below: (1) financing a capital cost of $10 million; and (2) financing a capital cost of $25 million. Financing is assumed Based on a 20-year amortization at a conservative municipal borrowing rate of 5%, the City would annually save approximately $80,000 in annual debt service charges for every $1 million reduction in the borrowed amount.

Partnerships & Sponsorships

Partnerships are discussed in more detail in Section 8.1.

Fundraising

The capital and ongoing operational costs of constructing recreational facilities are substantial and will inherently place pressures on the municipal budget. Seeking assistance from the community to contribute resources towards the construction and/or operation of the facility can be an effective way to provide services and spaces that are truly desired by residents. Some local user groups have indicated a willingness to participate in sponsorships and/or fundraising for new recreation facilities.

Capital fundraising is most effective when there is a clear purpose and target. The purpose can be best expressed when the schematic design has been completed. At this point there is sufficient clarity in the building plans that renderings and realistic artist's impressions can be provided. People can see what they will be getting. Also at this stage there is greater certainty about the cost of the facility. The City should determine what portion of the project costs it can fund and what portion should be contributed by the fundraising campaign. This defines the project objective and the funding target.

The success of the fundraising campaign will depend ultimately on the creativity and dedication of those involved (i.e. the Fundraising Committee, municipal staff and community volunteers). The ability to successfully solicit donations is largely relationship-based; developing relationships with major partners/donors, interaction with individual residents, planning innovative and fun fundraising events, etc. is central to the success. Those who contribute towards the facility need to feel that they are integral to the success of the project.

# Section 8: Implementation

This section examines factors relating to the implementation of this Study, including:

- management and partnership considerations;
- design and construction considerations;
- site selection considerations; and
- implementation plan.

## 8.1 Partnering with External Entities

This study is to provide the City with advice about partnerships or joint venture approaches that may be applicable to the development of a MURF facility in North Bay. As in most communities across Canada, in the future, the City may be challenged to meet the funding requirements of new facilities while maintaining its existing stock of assets in good repair. In jurisdictions where favourable conditions prevail, certain municipalities have applied alternative facility provision strategies to assist in easing some of these funding pressures.

Most municipalities view relationships with external groups as one of several of development methods for capital projects. And, as the number of examples grow, it is becoming increasingly clear that partnerships involve nuances not normally found in traditional municipal facility provision models. Consequently, many municipalities ensure that all potential partnerships undergo rigorous scrutiny through the application of a screening mechanism to examine the benefits and limitations of the opportunity. Municipalities that have adopted an evaluation framework to assess and secure suitable partners have found that the process: (1) informs municipal officials of the merits and drawbacks of each partnership candidate and project; and (2) clarifies the expectations and obligations of organizations looking to partner with the municipality.

### Benefits of Partnerships

Several common elements are inherent with successful municipal partnerships:

- The venture will be mutually beneficial to each partner.
- There are clearly defined roles and responsibilities.
- There is a performance evaluation methodology.
- There is a shared commitment to serve the needs of those affected by the venture.
- There is a commitment to improve.
- There is fair and honest recognition of each partner's contribution.

Relationships with outside groups will only be practical in North Bay if reasonable benefits accrue to the City and that the relationship supports municipal priorities. To this end, it is the City's responsibility to thoroughly analyze each potential relationship on its own merits. Generally, this analysis would involve an assessment of the potential relationship's ability to provide one or more of the following beneficial outcomes:

- Provide access to new sources of capital.

- Create public infrastructure at less capital cost than a municipal delivery model.
- Create public buy-in to the project by engaging the community.
- Gain access to systems and techniques that are beyond municipal capabilities.
- Gain access to experience or expertise that is outside the normal municipal approach.
- Achieve improved operating/financial performance beyond municipal capabilities.
- Transfer of certain operational risks or financial liabilities.

It is important that the City's relationships with external entities are with a compatible and willing partner that shares the municipality's long-term vision for the project. Not only should the partner bring the necessary skills and resources to fulfill its project obligations, but also demonstrate a public service attitude. Recognizing that all partnerships should be developed in response to specific circumstances of a particular project, potential partners should understand the City's intent to develop an open and honest relationship where each partner's contribution is important to the success of the project. Furthermore, the partner must be dedicated to the pursuit of mutually accepted objectives and endorse a philosophy of constant improvement. Finally, there must be shared commitment to provide a quality recreation environment that is consistent with the expectations of North Bay's residents.

**Partnership Alternatives**

There are three types of relationships that are generally available to municipalities interested in pursuing alternative approaches to deliver or operate recreation and sport infrastructure:

- A Public/Private Partnership (P3) – a relationship between the municipality and a private sector entity;
- A Public/Public Partnership (P2) – a relationship between the municipality and public sector agency such as a school board; and
- A N-F-P Partnership – the relationship between the municipality and a not-for-profit organization such as a local sports organization.

The following information is presented as a general discussion of the pros and cons of the above partnership alternatives based on the consultants' experience in other communities. If a particular opportunity arose for the City to involve an external entity in the development or operations of a MURF facility, it is strongly advised that municipal officials undertake a detailed analysis of the merits and drawbacks of the alternatives prior to proceeding with any one option.

The following table compares the implications of the three partnership alternatives in view of the potential benefits normally associated with alliances between municipalities and outside entities. Where possible, the specific application to the North Bay MURF project has been indicated.

An arrow pointing upward indicates a positive benefit, a sideways arrow indicates a neutral contribution, and an arrow pointing downward indicates distinct drawbacks related to the criterion.

**General Partnership Assessment**

| Benefit | P3 Partnership | | P2 Partnership | | N-F-P Partnership | |
|---|---|---|---|---|---|---|
| **Sources of new capital** | ↓ | Depending on the nature of the project, private partners may be interested in investing capital. However, private enterprise expects returns on investment that normally exceed the cost of funds available to the finance municipal projects (debentures). Therefore, private capital contributions sometimes increase financing cost to the project. | ↑ | Other public sector entities – such as school boards - are experiencing capital funding challenges similar to those facing municipalities. However, joint ventured projects may facilitate "pooling" of capital to increase the funding envelope. This is particularly applicable when use requirements allow the asset to be shared between the partners on a scheduled basis. | → | There are recent examples where not-for-profit partners have contributed capital to municipal projects (e.g. Pine Glen Soccer Centre in Oakville, ON). However, most sport or recreation organizations lack significant funding reserves that could be applied to the project. These groups are often willing to participate in fundraising efforts to support the facility. |
| **Project is less costly** | → | There is no evidence that this type of relationship would result in a project that was less costly than if the municipality was to develop the facility on its own. | ↑ | A joint ventured project can sometimes take advantage of existing facilities or amenities thereby avoiding the need to construct an entirely new project. Installing an air supported dome over an existing artificial turf field at a school site is one example of this cost saving concept. | → | There is no evidence that this type of relationship would result in a project that was less costly than if the municipality was to develop the facility on its own. |
| **More public and user group buy-in** | ↓ | There is often hesitation among user groups to participate in a project involving private enterprise. Groups believe that a private partner would have diminished accountability compared to a traditional municipal model and that the operator's profit motive would result in to higher prices. Sometimes a private operating model includes elements that conflict with local norms. For example, often private turf field operators run leagues that compete with user groups' programs – sometimes eroding program revenue that is important to the groups' sustainability. | ↑ | It is likely that the general public would welcome a relationship that maximizes the community benefits arising from the expenditure of public funds. | → | This type of relationship is generally well received in communities where municipalities have partnered with not-for-profit groups. However, it is important that the municipality establish a realistic framework that allows both the participating organization and the project to prosper. Finally, public officials must be open and transparent with the project details and the relationship with the N-F-P partner so that other local groups understand the basis, rationale and requirements of partnering with the municipality. |

| Benefit | P3 Partnership | | P2 Partnership | | N-F-P Partnership | |
|---|---|---|---|---|---|---|
| **New systems and techniques** | ↑ | Experienced private operators may have systems or technological supports that are currently not within the municipality's inventory of supports. | → | These types of relationships often result in the municipality operating the facility and consequently there would be neutral benefits associated with this criterion. | → | Unless the local organization has experience in operating a facility of the sort contemplated for the project, there would be neutral benefits associated with this criterion. |
| **Access to new expertise** | ↑ | Experienced private sector operators will have developed transferrable expertise in other locations that could be beneficial to the project. | → | These types of relationships often result in the municipality operating the facility and consequently there would be neutral benefits associated with this criterion. | ↓ | Unless the local organization has demonstrated abilities in operating a facility of the sort contemplated for the project, there would be a degree of risk in assigning operating responsibilities to an inexperience partner. |
| **Improved operating and financial performance** | ↑ | It is impossible to predict the financial performance of the privately operated facility without examining the operator's proposed business plan. However, there are examples where private operators have produced favourable financial results compared to municipal models. This is more often due to their ability to generate increased revenues rather than improvements in cost containment. More aggressive marketing efforts combined with abilities to generate "non-core" revenue (sponsorship, F & B, internal advertising, etc.) contribute to these financial successes. | ↑ | If a reasonable operating agreement could be negotiated between the municipality and the public agency, it is reasonable to expect that a financially beneficial operating cost sharing formula would be achievable. This would reduce the municipality's cost exposure. Furthermore, if the partner's constituents are potential facility users, the relationship could result in the venue realizing higher traffic counts, improved program participation, increases in facility rentals and other beneficial influences that could improve the facility's financial performance. | → | Financial performance is directly linked to the operator's expertise in generating revenue and containing costs. If the not-for-profit partner is an experienced facility operator, there may be financial advantages to the operation compared to a traditional municipal model. For example, if the facility was operated by the N-F-P partner, the labour cost model could be lower than a municipal operation. Furthermore, the operating partner may have more flexibility in terms of marketing, pricing, etc. However, this is all dependent on the partner's experience and expertise. |
| **Potential risk transfer** | → | Risk sharing and risk abatement is always a major theme in negotiations between public and private sector partners. Risk sharing is possible however, at some cost to the project (i.e. loss of rates and fee control). | ↑ | The terms and conditions of the joint venture agreement would include risk sharing provisions. | ↓ | It is unlikely that an N-F-P organization – made up of volunteers – would agree to absorb operating or financial risks. And, even if it were to do so, the risk consequences would be absorbed by the municipality if the organization was unable to handle its obligations. |

**Nuances of Partnerships**

While linkages between municipal governments and outside interests are not new, certain jurisdictions are contemplating relationships that are dramatic departures from traditional approaches to the delivery of services. Examples of this trend in the recreation field include partnerships through which traditional municipal leisure services are entirely delivered by a third party. For example, the YMCA is operating facilities and providing aquatic and/or community wellness programs in jurisdictions where the municipal recreation department was once the sole provider of services – London Ontario, Kelowna BC, etc. Likewise, certain municipalities have opted to align with private rink operators who help to develop, manage and program community arenas – Hamilton Ontario, Halifax Nova Scotia, etc.

There is no question that the concept of partnerships between governments and non-traditional partners is a growing trend. According to the Canadian Council of Public Private Partnerships (CCPPP), more P3 projects were closed in 2010 than ever before, making that year the most active on record. The CCPPP suggests that this is a testament to the commitment of the Canadian and provincial governments to use the P3 model as well as the capabilities of Canadian and international companies working in the partnership market.[8] And, with national and provincial ministries dedicated specifically to the cultivation of successful partnerships (P3 Canada, Partnerships BC, Infrastructure Ontario, etc.) it is unlikely that trend will diminish any time soon.

Not surprisingly, alternate service delivery arrangements are becoming more creative and successful as partners learn more about transition issues and the need for ongoing management of these new forms of relationships. There is no single formula that will satisfy all potential partnership situations. However, as the concept evolves, best practices and guidelines are beginning to emerge and be more widely accepted as process templates. Municipal governments are preparing to wrestle with the many facets of alternate service delivery by developing frameworks within which all potential relationships will be conceived, crafted, evaluated, and managed.

Research has found nine factors that should be in place when choosing to enter into a partnership or selecting a potential partner:

- Individual excellence – partners have something of value to contribute to the relationship.
- Importance – the contemplated alliance fits the strategic goals of each partner.
- Interdependence – the partners need each other and their complementary skills, to fulfill the goals and objectives of collaboration.
- Investment – there is tangible commitment of resources by all involved.
- Increased reach – the size of the partners' market or scope of services is expanded.
- Information – there is open communication regarding goals, conflicts, problems and changes.
- Integration – there are many connections between partners at several levels.
- Institutionalization – the alliance has a formal status in all organizations and cannot be abandoned on a whim.
- Integrity – no partner will try to undermine the alliance.

[8] 2010 CCPPP National Awards Case Study (2010)

**Types of Partnerships**

Although there are numerous forms of partnership structures available to local governments, the research suggests that most municipal arrangements can be grouped in one of the following categories:

- Strategic Alliance – a relationship that involves two or more organizations collaborating on planning and delivering select services and programs.
- Contract Agreement – services contracted to another partner organization, whereby the contracting partner may assist in the development of the service but has no responsibility for managing/operating the service other than ensuring the service is delivered to specification.
- Rental Agreement – facilities rented by one partner from another, where the renter either allocates designated times to affiliated groups or directly delivers services and programs to its constituents in the rented facility.
- Service Agreement – services provided through an agreement with two or more partner organizations, where services are jointly controlled, managed, and operated by the partners as specified in the agreement.
- Facility Development (Equity) Agreement – facilities that are mutually planned and jointly funded, and where constituents of the participating partners would have access to the facilities in accordance with an agreement governing facility use and operations.

**Realistic Expectations**

A review of partnership case studies suggests that the concept is a reasonable option for creating cost-effective solutions to both capital and operating challenges confronting certain recreation systems. However, partnerships are not a cure-all or a panacea for all the problems currently facing the public leisure sector. Too often, expectations are beyond the capacity of a partnership to deliver and consequently the relationship is eventually perceived as unsuccessful. Also, a partnership must be mutually beneficial and therefore there will likely be considerable give-and-take in terms of the project outputs. It is, therefore, advisable to establish clear and attainable objectives at the outset of the project and to tie the expectations of senior officials directly to the likely results of the relationship.

**Myths About Partnerships**

As mentioned above, most partnerships will not result in benefits that solve all the problems currently facing municipal leisure service providers. Common misconceptions include the following:

All risks will be transferred – While certain risks may be shared between the partners, the municipality will always be exposed to certain operational and commercial risks. For example, taxpayers will always look to the municipality to resolve disputes or other operational problems even though an outside entity is responsible for service delivery. Additionally, it is impossible to transfer risk without also transferring control over the elements that will influence risk. For example, a municipal partner will not likely be successful in transferring revenue risk while retaining control over price setting. Even though a municipality might decide to contract-out the delivery of certain services, it is likely the municipality will still be on the hook for any complaints or criticisms associated with service quality or interruptions in

services. There have been cases in Ontario where third party providers have abandoned projects that were valued by the community forcing the municipality to step in to resurrect the service. These situations are troubling because they are often unforeseen which means municipal staff must respond in an emergency fashion. Also, municipalities have had to deal with financial issues where former third party providers have received advanced payment for services that were not delivered.

Private equity will solve capital funding problems – As mentioned in the discussion in the preceding table private sector capital is often more expensive than traditional municipal funding models. Typically the private sector anticipates returns on investment that are higher than municipal borrowing rates. Furthermore, traditional lending institutions are less likely to provide private partners with financing assistance in the absence of a municipalities covenant to backstop the loan. It is for this reason that many capital projects involving private partners have been entirely funded by local government.

Sponsorships/naming right fees will make an otherwise unviable project viable – While sponsorships, naming rights and creative marketing endeavours can produce useful streams of revenue, the consultants are unaware of any cases where these activities have converted a loser to a winner.

Partners with similar mandates will have a solid and successful relationship – Frequently this is not the case because of conflicts in styles, branding issues or differing approaches to certain aspects of the business. For example, some municipalities that have entered into recreation facility operating agreements with not-for-profit groups have later discovered that the municipality's brand has all but disappeared from the facility. In other cases, under the operating agreement, municipal recreation clients are required to pay membership fees to access the facility or participate in its programs – a client relationship that is significantly different than traditional municipal approach. These issues have resulted in substantial reshaping of the agreement or outright cancellation.

Once the relationship is struck, the municipality has little to do – To be successful, partnerships need to be effectively managed. It is not sufficient for the municipality to nurture a relationship and then leave the partner to its own devices. It is the municipality's obligation to maintain an ongoing relationship with its partner to ensure that service standards are maintained; contractual obligations are met; required supports are provided; and potential problems are addressed through joint planning. A balance must be struck between the municipality's responsibility for audit and oversight and the partner's right to conduct business with minimal interference. Each party should appoint one person to be the main contact point on all matters relating to the administration of the agreement. They should meet on a regular basis to stay abreast of emerging issues, resolve potential problems and identify opportunities where additional resources are required to enhance the success of the relationship.

**Implications for the MURF Project**

As reported earlier in this study, North Bay's arenas are aging and are in need of certain repairs and physical enhancements to alleviate operating concerns caused by poor facility designs. Small ice surfaces and accessibility issues are problematic for recreational users and the rinks' configurations are not well suited for tournaments or other types of events. Although four ice surfaces can adequately meet the needs of the City's users, a variety of redevelopment options have been suggested to deal with the identified capital maintenance and design issues.

Certain options contemplate "clustering" the ice pads in multi-pad configurations. This would allow for improvements to the operational and financial performance of the facilities because multiple pad arenas are more programmatically versatile and more cost efficient to operate. And, while the City will likely remain as the operator of the facilities, the order of magnitude of these potential new developments could present partnership opportunities.

Many municipalities with four pad arenas have added tenant spaces for businesses that can take advantage of the substantial foot traffic generated by these major venues. Upscale concessions or restaurants and sports themed retail outlets are often associated with these large arena operations. The introduction of these services to the complex can produce new revenue in the form of rent while improving the vibrancy of the facility by expanding its appeal to a broader audience.

The needs assessment also identified demand for two indoor turf fields to serve the needs of soccer groups and other sports field users. The development and operations of this type of facility also presents potential partnership opportunities. While a two-field complex may not be of sufficient size to attract private sector interest, the City could partner with an educational institution such as the arrangement currently being negotiated between the Town of Milton and the Halton Catholic District School Board. In Milton, the preliminary discussions contemplate that the Town would erect an air-supported bubble structure over an artificial turf field that will be located at a new high school. Or, the City might explore a partnership with a local sports organization that would also benefit from this type of facility such as the arrangement between the Town of Oakville and the Oakville Soccer Club. In Oakville, the Club contributed capital to the Pine Glen Soccer Complex and is operating the facility under a non-exclusive license agreement. Either of these partnership options may be a possibility in North Bay.

## 8.2 Design & Construction Considerations

From the consultants' experience, we have found the following factors will affect the tenders and the ultimate construction costs of most public building projects, especially those delivered through a competitive bidding process.

- Prevailing market conditions have the most important effect on pricing. Ideally, there must be adequate competition among general contractors and sub-contractors to maintain reasonable overheads and profits. Prices are always higher when construction activity is brisk. Similarly, a shortage of labour or materials will also adversely affect prices, as with the well publicized steel shortage. Prices in the ICI (industrial, commercial, institutional) sector are generally rising faster than the Consumer Price Index because of an escalating shortage of experienced labour. Retiring older workers are not being replaced at the required rate to maintain equilibrium.

- Design characteristics will affect the design. As with most things, simplicity is less expensive. Obviously, the cost and quality of individual building materials and systems will affect the overall cost. Prefabricated metal buildings are less expensive than the existing masonry and concrete arena, and shell / tube refrigeration is less expensive than plate / frame systems. Often, operating and maintenance (life cycle) costs are ignored to minimize initial capital costs, as with systems that save energy but cost more to install.

- Environmental conditions like weather, soils conditions, and groundwater levels will affect costs. The construction scheduling should be coordinated to minimize winter construction that necessitates temporary enclosures and heating. Similarly, the area of the site least affected by poor bearing capacity and high water table should be chosen, especially for pool and ice slab construction.

- Constructing the project in phases will be more expensive than one large project. There is an economy of scale to be gained by reducing contractor and consultant overhead. The overhead for a large project is not proportionately larger than the overhead for a small project.

- Owner / Stakeholder involvement at an early stage will contribute to the overall timeliness and program resolution of the project. Rushing the design development / contract document stage of a project will result in a contract that requires more monitoring during construction than one with an adequate design phase. This can result in unforeseen costs.

The City may also wish to pursue LEED Silver certification for its future recreation facility construction (although it is not included in the cost analysis within this study). Additional design considerations include the following, which should be accommodated into various facility designs, where possible:

- Facility entrances should promote a welcoming atmosphere, including appropriate lighting and use of windows, open and casual front desk, and a lounge/lobby area. Facilities should have a single point control desk for efficient staffing and ease of maintenance.
- Entries should be visible from the approaches to the building and the visibility of the entire exterior is important also for passive safety and security.
- Buildings should be organized with a clear public circulation system with all program rooms visible from a lobby and entrance. Blind corridors should be avoided.
- Facilities should be designed on CPTED principles, with clear visibility from the control and administration directly to a well lit site and parking area.
- Buildings should encourage opportunities for casual interaction, including space for parents waiting for children in programs.
- Public washrooms should have view baffles without doors for aural control; washroom entrances should be clearly visible from the public lobby and the control desk.
- Buildings should respond to their site, making connections to adjacent parks, paths and exterior terraces.
- Buildings may embrace LEED principles on all environmental levels. They should be oriented to work in harmony with the landforms of the site and take advantage of the 'low-tech' assistance of the site sun and wind angles.
- Buildings should take advantage of balanced natural light for low-glare interior illumination and reduced energy costs.
- Buildings should be based on a clear organization that anticipates future growth and program expansion without disrupting the operation of the facility.

- Mechanical and electrical systems should leverage the benefits of the building type, including heat recovery on the refrigeration system, re-use of low grade recycled heat and energy efficient fluorescent lighting in the large arena halls.
- Larger facilities should also be designed to act as an Emergency Evacuation Centre for the area (i.e., provide shelter and food to people affected by significant local or regional emergencies).

## 8.3 Site Selection Considerations

Should the City decide to move forward with new construction, evaluating and selecting a site for the preferred option(s) is vitally important to the project's ultimate success. Locations need to be chosen with care, so as to embody as many key characteristics as possible. Maximizing accessibility to as many residents as possible (and to also provide sport tourism functions, if applicable) should certainly be one of the key objectives; however, there is also a need to ensure that the site (and the facility) can be properly serviced, is compatible with adjacent land uses, can be cost effectively developed, and so on. The site can also have a dramatic impact on the facility's construction cost. Servicing potential, stormwater management, traffic and road access, soil condition, available infrastructure, etc. can all result in significant budget implications. In all of these respects, the Memorial Gardens site is a good candidate for further evaluation, depending on the option that is chosen.

The following criteria provide a strong rational basis for evaluating potential sites. While it is preferable for the selected site(s) to demonstrate all of the criteria, it is possible that they all may not be able to be met. Should the City require a site selection process for a new recreational facility, the following criteria should be considered.

Location & Access

- The site is within reasonable proximity to existing and future residential areas.
- The site is located along an arterial or collector road, is in the vicinity of a sidewalk or walkway with lighting during the evening, and has barrier-free access.

Focal Point Potential

- The site is located at or has the potential to be a community focal point and the site is at a highly visible location.

Site Development Potential

- The site area and shape are sufficient for the proposed use and provide a reasonable level of flexibility in design.
- The site is able to accommodate enough on-site and/or nearby parking for both patrons and staff.

Community Compatibility

- The facility would be compatible (in terms of building design, scale, landscaping, setbacks, etc.) with the surrounding area/buildings.

Known Constraints

- The site is not unduly impacted by a geographic barrier (e.g. watercourse, rail line), is not restricted by easement/man-made obstructions, does not require site decommissioning (e.g. brownfield), and is relatively flat.
- Suitable infrastructure exists (e.g. sewers, water, etc.) on or adjacent to the site.
- The site does not require the demolition of an existing building or elimination of necessary parkland, parking or other vital land use.

Planning Approval Status

- The site complies with Official Plan policies and has acceptable Zoning By-Law regulations.

Availability of Site

- The site is owned by the City (preferable) or the site is currently for sale.

Expansion Potential

- The site possesses long-term expansion potential.

Amenity Opportunities

- The site has the ability to enhance and support other facilities, accommodate potential partners, and generate increased usage due to proximity to other locations.
- The site offers the potential for economies of scale in construction and/or operation due to the co-location of other municipal and/or community services.

Enhanced Design Potential

- The site has the ability to incorporate outdoor parkland/features and architecturally integrate with surrounding buildings.

## 8.4 Implementation Plan

If the preferred project involves a more complex facility such as a multi-use recreational complex, it is suggested that the City consider planning the delivery of the project through a conventional Design-Bid-Build (DBB) approach. Following this approach, the City would work with a Prime Consultant to develop a design for the project, issue a tender and receive bids to construct the complex, and then contract with a constructor to have the centre built. This approach gives the City the greatest control of what will be built and provides a product of market quality at a competitive price within a reasonable, standard schedule. While the DBB system does not guarantee a superior product, the environment to achieve this goal is maintained by the participation of the client and the client-retained consultant throughout all phases of the project. This recommendation is based on the assumption that the City will secure funding for the project and that there is no urgent requirement to have construction completed by a specific date.

If the funding context is different, such as if funding requires rapid completion to meet a funding timeline, then a Design-Build (DB) approach would give greater certainty of cost and rapid delivery at the expense of some control over the design of the building. However, in the DB method, there is no strong advocate acting on behalf of the client's interests when the technical drawings and specifications are being produced. Consultants retained by the builder to furnish the "design" part of the design-build

are clearly in a conflict situation if they are purporting to act as an agent of the client. They do have responsibility for Building Code issues, but not necessarily for non-code issues of building quality. It is the prudent client who will retain independent consultants to assist in reviewing these documents as well as to represent the client's interests on-site through periodic construction review to monitor contract compliance and provide estimates of progress for payment certification. When the cost of these additional consulting fees is added to the DB contact cost, the overall project economics are less attractive.

The ordered tasks below are intended to guide the City of North Bay in the development of new indoor recreation facilities using a Design-Bid-Build delivery methodology.

1) Acquisition of consultants – the recommended strategy is to issue an RFP for a project manager to provide services through the life of the project; the project manager would develop a procurement strategy and lead the procurement of other consultants.
2) Functional program – the general recommendations of the feasibility study will be further elaborated to define the specific requirements for the facility; typically defined by an architect
3) Schematic design – includes floor plans and elevations and shows the character and materials to be used in the building
4) Allocation of funds – the project budget is assessed to make a determination of how, and when, to proceed; this is an appropriate stage to commence fundraising efforts through the procurement of a professional fundraising firm
5) Construction document preparation – includes design development and the preparation of tender documents, sufficient for preliminary site plan approval; on completion of the tender documents a pre-tender Class B estimate to within 10% of the contract cost can be developed
6) Tendering and award – tender documents are issued and interested general contractors (or pre-qualified bidders) develop submissions and pricing, which are formally evaluated by the City and its project manager; the lowest priced bid that meets the tender requirements is awarded the contract
7) Construction – the successful bidder will construct the project in accordance with the construction documents, with significant oversight from the City and its project manager
8) Commissioning – this process ensures that the City's requirements are incorporated into the design, are built, and are configured to produce the required result (often achieved with the assistance of a Commissioning Agent); move-in follows, which can require considerable advance coordination

**The implementation process for a new construction project is likely to take a minimum of three years** given the need to receive final approval, secure funding, establish partnership parameters (if applicable), complete the design and tender process, and construct the facility. Even this may be aggressive as there are many factors that could delay this project even further (e.g., fundraising, site requirements, partner requirements, etc.). A substantial renovation or expansion may require slightly less time.

# Appendix A: Household Survey Summary

**1. In the past 12 months, have you or anyone in your household participated in any of the following activities? This includes both formal and informal situations where you or a member of your household are an active participant, not a spectator.**

| | Yes | | No | | Don't Know | | Total | |
|---|---|---|---|---|---|---|---|---|
| | # | % | # | % | # | % | # | % |
| Walking for Leisure | 313 | 81% | 73 | 19% | 0 | 0% | 386 | 100% |
| Running or Jogging | 114 | 30% | 272 | 70% | 0 | 0% | 386 | 100% |
| Hockey | 102 | 26% | 284 | 74% | 0 | 0% | 386 | 100% |
| Figure Skating | 18 | 5% | 368 | 95% | 0 | 0% | 386 | 100% |
| Ringette | 9 | 2% | 377 | 98% | 0 | 0% | 386 | 100% |
| Public Skating | 118 | 31% | 267 | 69% | 1 | 0% | 386 | 100% |
| Soccer (indoor or outdoor) | 78 | 20% | 307 | 80% | 1 | 0% | 386 | 100% |
| Baseball or Softball | 52 | 13% | 333 | 86% | 1 | 0% | 386 | 100% |
| Football | 27 | 7% | 357 | 92% | 2 | 1% | 386 | 100% |
| Lacrosse | 9 | 2% | 375 | 97% | 2 | 1% | 386 | 100% |
| Gymnasium Sports such as Basketball, Volleyball or Badminton | 99 | 26% | 285 | 74% | 2 | 1% | 386 | 100% |
| Golf | 140 | 36% | 244 | 63% | 2 | 1% | 386 | 100% |

**2. a) Are you and members of your household able to participate in indoor recreation activities - such as hockey, skating, or gymnasium sports - as often as you would like?**

| | # | % |
|---|---|---|
| Yes | 235 | 61% |
| No | 149 | 39% |
| Don't Know | 2 | 1% |
| Total | 386 | 100% |

**2. b) IF NO, why not? (up to 2 mentions)**

| | # | % of subset | % of sample |
|---|---|---|---|
| Lack of personal time / Too busy | 40 | 26% | 10% |
| Lack of desired facilities or programs | 18 | 12% | 5% |
| Program not offered at convenient time | 10 | 7% | 3% |
| Lack of money / Too expensive | 14 | 9% | 4% |
| Lack of information / Unaware of opportunities | 0 | 0% | 0% |
| Lack of transportation / Facility too far away | 1 | 1% | 0% |
| Health Problems / Disability / Age | 70 | 46% | 18% |
| Language / Cultural Barrier | 0 | 0% | 0% |
| Other | 2 | 1% | 1% |

| *2.b) Other* |
|---|
| Lack of interest |
| Weather |

**3. a) Are there any indoor recreation activities that you or members of your household would like to see offered in North Bay that are not currently available?**

| | # | % |
|---|---|---|
| Yes | 53 | 14% |
| No | 312 | 81% |
| Don't Know | 21 | 5% |
| Total | 386 | 100% |

**3. b) If Yes: What activities would you like to see offered?**

| Activity | # |
|---|---|
| Indoor Soccer | 9 |
| Swimming | 7 |
| Gymnasium Sports (e.g. badminton, fustal, floor hockey, basketball) | 6 |
| Lacrosse | 4 |
| Hockey | 4 |
| Public Skating | 4 |
| Indoor Cycling | 3 |
| Indoor Golf | 2 |
| Squash | 2 |
| Indoor Tennis | 2 |
| Table Tennis | 2 |

| Activity | # |
|---|---|
| Indoor Volleyball | 2 |
| Adult Sports Leagues | 2 |
| Judo/Yoga | 2 |
| Rock Climbing | 1 |
| Roller Derby | 1 |
| Fencing | 1 |
| Dancing | 1 |
| Cooking Classes | 1 |
| Health Training Programs | 1 |
| (Other: Skateboard, Moster Trucks, Pickle Ball, BMX) | 4 |

**4. Using a scale of 1 to 5 where 1 is "not at all satisfied" and 5 is "very satisfied", please indicate your level of satisfaction with the availability of indoor recreational opportunities in North Bay for the following age groups.**

| | Not at all Satisfied (1) | | Not Satisfied (2) | | Somewhat Satisfied (3) | | Satisfied (4) | | Very Satisfied (5) | | Don't Know | | Total (of subset) | | AVG |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | # | % | # | % | # | % | # | % | # | % | # | % | # | % | |
| a) Children (ages 0-12) | 12 | 3% | 29 | 8% | 58 | 15% | 81 | 21% | 69 | 18% | 137 | 35% | 386 | 100% | 3.67 |
| b) Teens (ages 13-18) | 14 | 4% | 30 | 8% | 63 | 16% | 72 | 19% | 53 | 14% | 154 | 40% | 386 | 100% | 3.52 |
| c) Adults (ages 19-54) | 14 | 4% | 30 | 8% | 64 | 17% | 109 | 28% | 78 | 20% | 91 | 24% | 386 | 100% | 3.70 |
| d) Older Adults and Seniors (ages 55+) | 19 | 5% | 45 | 12% | 58 | 15% | 69 | 18% | 61 | 16% | 134 | 35% | 386 | 100% | 3.43 |

**5. What is a reasonable length of time for you to travel for the indoor recreation activities that your household does the most?**

| | # | % |
|---|---|---|
| 0 to 9 minutes | 47 | 12% |
| 10 to 14 minutes | 95 | 25% |
| 15 to 19 minutes | 112 | 29% |
| 20 to 24 minutes | 50 | 13% |
| 25 to 29 minutes | 13 | 3% |
| 30 to 44 minutes | 31 | 8% |
| 45 minutes or more | 10 | 3% |
| Other | 2 | 1% |
| Don't Know | 26 | 7% |
| Total | 386 | 100% |

| *5. Other* |
|---|
| 8 hours |
| 10 hours |

**6. a) In the past 12 months, have you or anyone in your household visited the Memorial Gardens Arena?**
**7. a) In the past 12 months, have you or anyone in your household visited the Pete Palangio?**
**8. a) In the past 12 months, have you or anyone in your household visited the West Ferris Community Centre and Arena?**
**9. a) In the past 12 months, have you or anyone in your household visited an arena that was outside the City of North Bay ?**

| | Yes | | No | | Don't Know | | Total | |
|---|---|---|---|---|---|---|---|---|
| | # | % | # | % | # | % | # | % |
| Memorial Gardens Arena | 239 | 62% | 146 | 38% | 1 | 0% | 386 | 100% |
| Pete Palangio Arena | 167 | 43% | 218 | 56% | 1 | 0% | 386 | 100% |
| West Ferris Community Centre and Arena | 146 | 38% | 239 | 62% | 1 | 0% | 386 | 100% |
| Arenas Outside of the City of North Bay | 148 | 38% | 234 | 61% | 4 | 1% | 386 | 100% |

**6. b) Using a scale of 1 to 5, where 1 is "poor" and 5 is "excellent", please rate the adequacy of the Memorial Gardens Arena for meeting the needs of your household.**
**7. b) Using a scale of 1 to 5, where 1 is "poor" and 5 is "excellent", please rate the adequacy of the Pete Palangio Arena for meeting the needs of your household.**
**8. b) Using a scale of 1 to 5, where 1 is "poor" and 5 is "excellent", please rate the adequacy of the West Ferris Community Centre and Arena for meeting the needs of your household.**
**9. b) Using a scale of 1 to 5, where 1 is "poor" and 5 is "excellent", please rate the adequacy of the arenas outside of the City of North Bay for meeting the needs of your household.**

| | Poor (1) | | (2) | | (3) | | (4) | | Excellent (5) | | Don't Know | | Total | | AVG |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | # | % | # | % | # | % | # | % | # | % | # | % | # | % | |
| Memorial Gardens Arena | 7 | 3% | 18 | 7% | 50 | 21% | 91 | 38% | 71 | 30% | 4 | 2% | 239 | 100% | 3.86 |
| Pete Palangio Arena | 11 | 7% | 20 | 12% | 47 | 28% | 49 | 29% | 38 | 23% | 2 | 1% | 167 | 100% | 3.50 |
| West Ferris Community Centre and Arena | 11 | 8% | 18 | 12% | 48 | 32% | 33 | 23% | 35 | 24% | 3 | 2% | 146 | 100% | 3.44 |
| Arenas Outside of the City of North Bay | 1 | 1% | 4 | 3% | 38 | 24% | 58 | 38% | 47 | 32% | 4 | 3% | 148 | 100% | 4.00 |

**10. Using a scale of 1 to 5, where 1 is "not at all important" and 5 is "very important", how important are Arenas to your household?**
**11. Using a scale of 1 to 5, where 1 is "not at all satisfied" and 5 is "very satisfied" how satisfied is your household with the Arenas in North Bay?**

| | Not at all Important/ Satisfied (1) | | Not Important/ Satisfied (2) | | Somewhat Important/ Satisfied (3) | | Important/ Satisfied (4) | | Very Important/ Satisfied (5) | | Don't Know | | Total | | AVG |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | # | % | # | % | # | % | # | % | # | % | # | % | # | % | |
| Importance | 98 | 25% | 50 | 13% | 71 | 18% | 61 | 16% | 105 | 27% | 1 | 0% | 386 | 100% | 3.06 |
| Satisfaction | 25 | 6% | 27 | 7% | 87 | 23% | 121 | 31% | 77 | 20% | 49 | 13% | 386 | 100% | 3.59 |

**12. In order to build or improve local facilities, some amount of tax dollars are typically used. Keeping this in mind, to what degree should the City spend additional public funds on the following projects? Please use a scale from 1 to 5, where 1 means "do not spend additional money on this type of project" and 5 means "definitely spend additional money on this type of project".**

| | Don't Spend (1) | | | | | | | | Definitely Spend (5) | | Don't Know | | Total | | AVG |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | # | % | # | % | # | % | # | % | # | % | # | % | # | % | |
| Fixing up Existing Arenas | 53 | 14% | 40 | 10% | 115 | 30% | 75 | 19% | 93 | 24% | 10 | 3% | 386 | 100% | 3.31 |
| Completely Rebuilding one or more Existing Arenas | 138 | 36% | 58 | 15% | 65 | 17% | 45 | 12% | 66 | 17% | 14 | 4% | 386 | 100% | 2.58 |
| Building one or more Additional Arenas | 185 | 48% | 42 | 11% | 56 | 15% | 48 | 12% | 63 | 16% | 12 | 3% | 386 | 100% | 2.47 |
| Building an Indoor Track for walking and jogging | 124 | 32% | 55 | 14% | 57 | 15% | 63 | 16% | 83 | 22% | 4 | 1% | 386 | 100% | 2.81 |
| Building an Indoor Sports Field for activities such as soccer and sport training | 134 | 35% | 57 | 15% | 78 | 20% | 55 | 14% | 57 | 15% | 4 | 1% | 386 | 100% | 2.59 |
| Building a Gymnasium for activities such as basketball and volleyball | 145 | 38% | 54 | 14% | 83 | 22% | 55 | 14% | 41 | 11% | 8 | 2% | 386 | 100% | 2.45 |
| Building smaller Multi-use Rooms for activities such as aerobics or meetings | 155 | 40% | 71 | 18% | 88 | 22% | 40 | 10% | 29 | 8% | 5 | 1% | 386 | 100% | 2.26 |

| *12. b) Other High Priorities (open-ended)* | # |
|---|---|
| Affordable Activities | 2 |
| Indoor Tennis | 1 |
| Teen Activities | 1 |

**13. Using a scale of 1 to 5, where 1 is "not at all willing" and 5 is "very willing", if the City were to substantially improve the quality of its arenas, how willing would your household be to consider the following options to help pay for this?**

| | Not At All Willing (1) | | | | | | | | Very Willing (5) | | Don't Know | | Total | | AVG |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | # | % | # | % | # | % | # | % | # | % | # | % | # | % | |
| Pay an increased fee for activities and sport registrations | 139 | 36% | 59 | 15% | 83 | 22% | 58 | 15% | 37 | 10% | 10 | 3% | 386 | 100% | 2.45 |
| Donate funds | 158 | 41% | 58 | 15% | 102 | 26% | 35 | 9% | 27 | 7% | 6 | 2% | 386 | 100% | 2.25 |
| Pay higher property taxes | 257 | 67% | 36 | 9% | 47 | 12% | 23 | 6% | 13 | 3% | 10 | 3% | 386 | 100% | 1.67 |

**13. d) Asked to those responding 2 to 5 in support of paying higher property taxes: This year, the average household will pay about $66 in taxes for the operation and maintenance of arena facilities. How much more would you be willing to pay on an annual basis for improved arenas?**

| | # | % of subset | % of sample |
|---|---|---|---|
| $0 to $9 | 28 | 24% | 7% |
| $10 to $19 | 15 | 13% | 4% |
| $20 to $29 | 14 | 12% | 4% |
| $30 to $39 | 18 | 15% | 5% |
| $40 to $49 | 9 | 8% | 2% |
| $50 to $59 | 6 | 5% | 2% |
| $60 to $69 | 13 | 11% | 3% |
| $70 to $79 | 1 | 1% | 0% |
| $80 to $89 | 0 | 0% | 0% |
| $90 to $99 | 0 | 0% | 0% |
| $100 to $109 | 7 | 6% | 2% |
| $110+ | 8 | 7% | 2% |
| Total | 119 | 100% | 31% |

**14. Using the same scale of 1 to 5 where 1 is "not at all willing" and 5 is "very willing", how willing would your household be to pay higher property taxes for an arena project if it also included the construction of other indoor recreation spaces, such as an indoor track or indoor sports field?**

| | Not At All Willing (1) | | | | | | | | Very Willing (5) | | Don't Know | | Total | | AVG |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | # | % | # | % | # | % | # | % | # | % | # | % | # | % | |
| Willingness | 187 | 48% | 54 | 14% | 58 | 15% | 46 | 12% | 27 | 7% | 14 | 4% | 386 | 100% | 2.12 |

**16. On a scale of 1 to 5, where 1 is "strongly disagree" and 5 is "strongly agree", please indicate your level of agreement with the following statements.**

| | Strongly Disagree (1) | | Disagree (2) | | Neither Agree nor Disagree (3) | | Agree (4) | | Strongly Agree (5) | | Don't Know | | Total | | AVG |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | # | % | # | % | # | % | # | % | # | % | # | % | # | % | |
| The development of a new Multi-use Recreation Facility should be a high priority for City Council. | 138 | 36% | 65 | 17% | 74 | 19% | 46 | 12% | 58 | 15% | 4 | 1% | 386 | 100% | 2.53 |
| The City should consider partnering with others to help provide indoor recreation facilities | 52 | 13% | 30 | 8% | 93 | 24% | 93 | 24% | 111 | 29% | 7 | 2% | 386 | 100% | 3.48 |
| The amount of time it currently takes for your household to travel to indoor recreation activities is reasonable | 17 | 4% | 11 | 3% | 29 | 8% | 95 | 25% | 222 | 58% | 12 | 3% | 386 | 100% | 4.32 |
| Attracting more regional, provincial, or national sport tourism events - such as tournaments and competitions - should be a high priority for City Council | 43 | 11% | 27 | 7% | 78 | 20% | 100 | 26% | 132 | 34% | 6 | 2% | 386 | 100% | 3.66 |

DEMOGRAPHICS

**16. How many people, including yourself, live in your household?**

| | # | % |
|---|---|---|
| 1 | 65 | 17% |
| 2 | 154 | 41% |
| 3 | 57 | 15% |
| 4 | 65 | 17% |
| 5 | 28 | 7% |
| 6 | 7 | 2% |
| 7 or more | 2 | 1% |
| **Total** | **378** | **100%** |
| No Response | 8 | |
| Average Household Size | 2.65 | |

**17. Please indicate the total number of persons within your household that fall into the following age categories.**

| | # | % of sample | *2006 Census* |
|---|---|---|---|
| under 10 years | 100 | 10% | *10%* |
| 10-19 years | 134 | 13% | *14%* |
| 20-34 years | 147 | 15% | *19%* |
| 35 to 54 years | 280 | 28% | *28%* |
| 55 and over | 340 | 34% | *28%* |
| **Total** | **1,001** | **100%** | **100%** |
| No Response | 7 | | |

**18. In what year were you born?**

| | # | % |
|---|---|---|
| 1929 or earlier (82 yrs or older) | 12 | 3% |
| 1930 to 1939 (72 to 82 yrs) | 41 | 12% |
| 1940 to 1949 (62 to 72 yrs) | 71 | 20% |
| 1950 to 1959 (52 to 62 yrs) | 74 | 21% |
| 1960 to 1969 (42 to 52 yrs) | 72 | 20% |
| 1970 to 1980 (32 to 42 yrs) | 44 | 12% |
| 1980 or later (16 to 32 yrs) | 39 | 11% |
| **Total** | **353** | **100%** |
| No Response | 33 | |
| Average Year | 1957 | |
| Average Age | 54 | |

**19. What are the first three digits of your postal code?**

| | # | % | *Canada Post* |
|---|---|---|---|
| P1A | 132 | 36% | *30%* |
| P1B | 211 | 58% | *65%* |
| P1C | 21 | 6% | *4%* |
| P0H | 1 | 0% | -- |
| Other | 0 | 0% | -- |
| **Total** | **365** | **100%** | |
| No Response/Don't Know | 21 | | |

**20. Do you own or rent your home?**

| | # | % |
|---|---|---|
| Own | 308 | 83% |
| Rent | 64 | 17% |
| **Total** | **372** | **100%** |
| No Response/Don't Know | 14 | |

**21. As an optional question, what is your household's total annual income before taxes? Is it...**

| | # | % |
|---|---|---|
| Under $40,000 | 63 | 24% |
| Between $40,000 and $60,000 | 59 | 23% |
| Between $60,000 and $80,000 | 42 | 16% |
| Between $80,000 and $100,000 | 32 | 12% |
| Over $100,000 | 62 | 24% |
| **Total** | **258** | **100%** |
| No Response/Don't Know | 128 | |

**22. Gender**

| | # | % |
|---|---|---|
| Male | 149 | 39% |
| Female | 237 | 61% |
| **Total** | **386** | **100%** |

# Appendix B: List of Background Documents

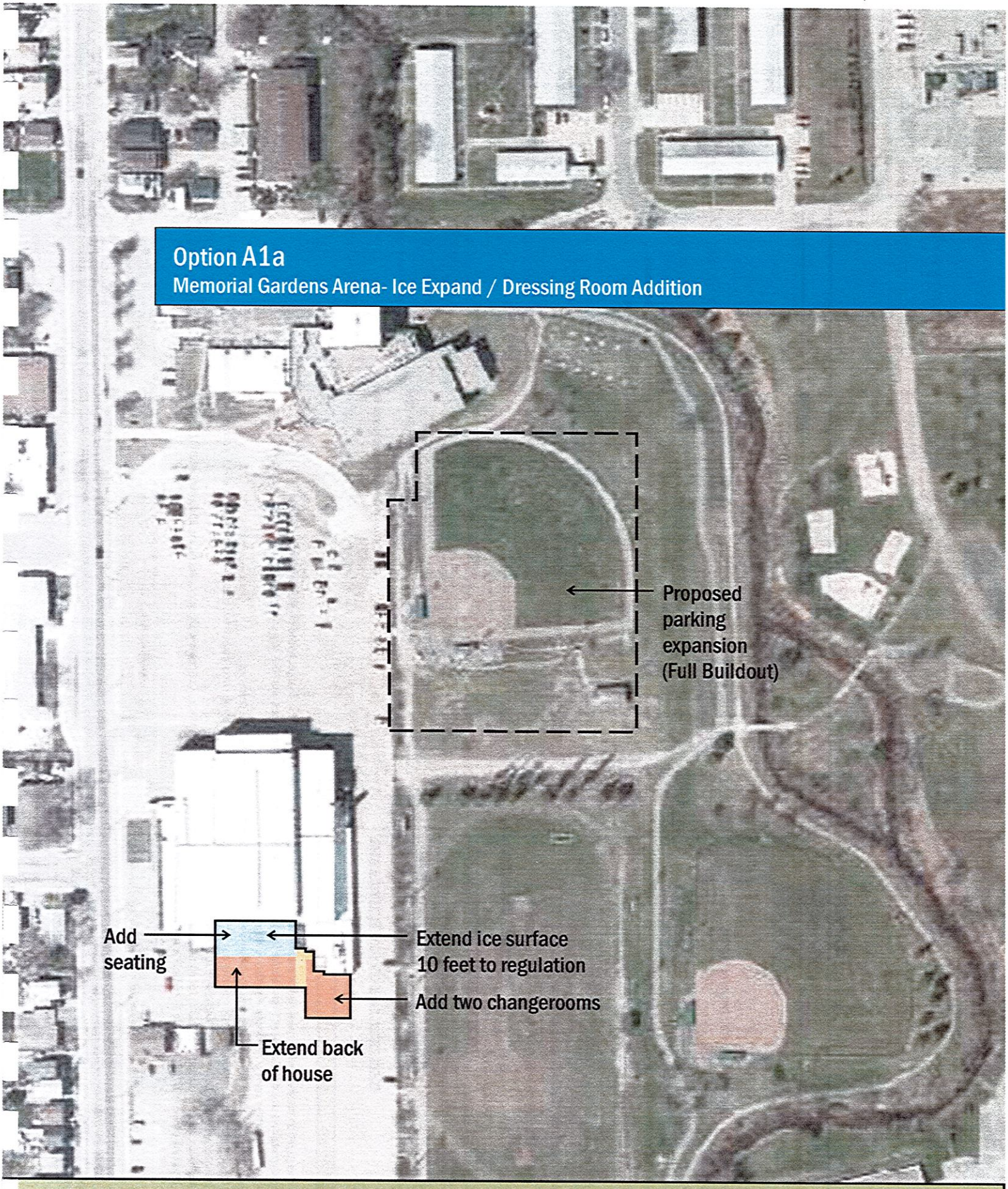
To ensure that the Feasibility Study considers the work previously undertaken, a review of existing background documents, studies, and consultation relating to recreation facility and services within the City of North Bay was undertaken (see below). Salient points are outlined below and have been taken into account in the completion of the current project.

- Sport Tourism Work Plan (2011)
- Structural Integrity Inspections, all arenas (2010)
- BMA Municipal Study (2010)
- Population, Household, and Employment Forecast Update (2009)
- City of North Bay Official Plan (2009)
- Development Charges Background Study (2009)
- Arena Assessment Report (2008)
- Recreation, Sport and Healthy Active Living Strategy (2007)
- Building Condition Assessments, all arenas (2005)
- Tourism and Leisure Long Range Plan (2000)
- Previous public submissions on Arena and MURF needs
- Capital Budget and Forecast documents
- Arena schedules and utilization data

# Appendix C: Concept Plans and Capital Cost Estimates

## Option A1a

### Memorial Gardens Arena- Ice Expand / Dressing Room Addition



# City of North Bay - MURF Feasibility Study - Option A1a

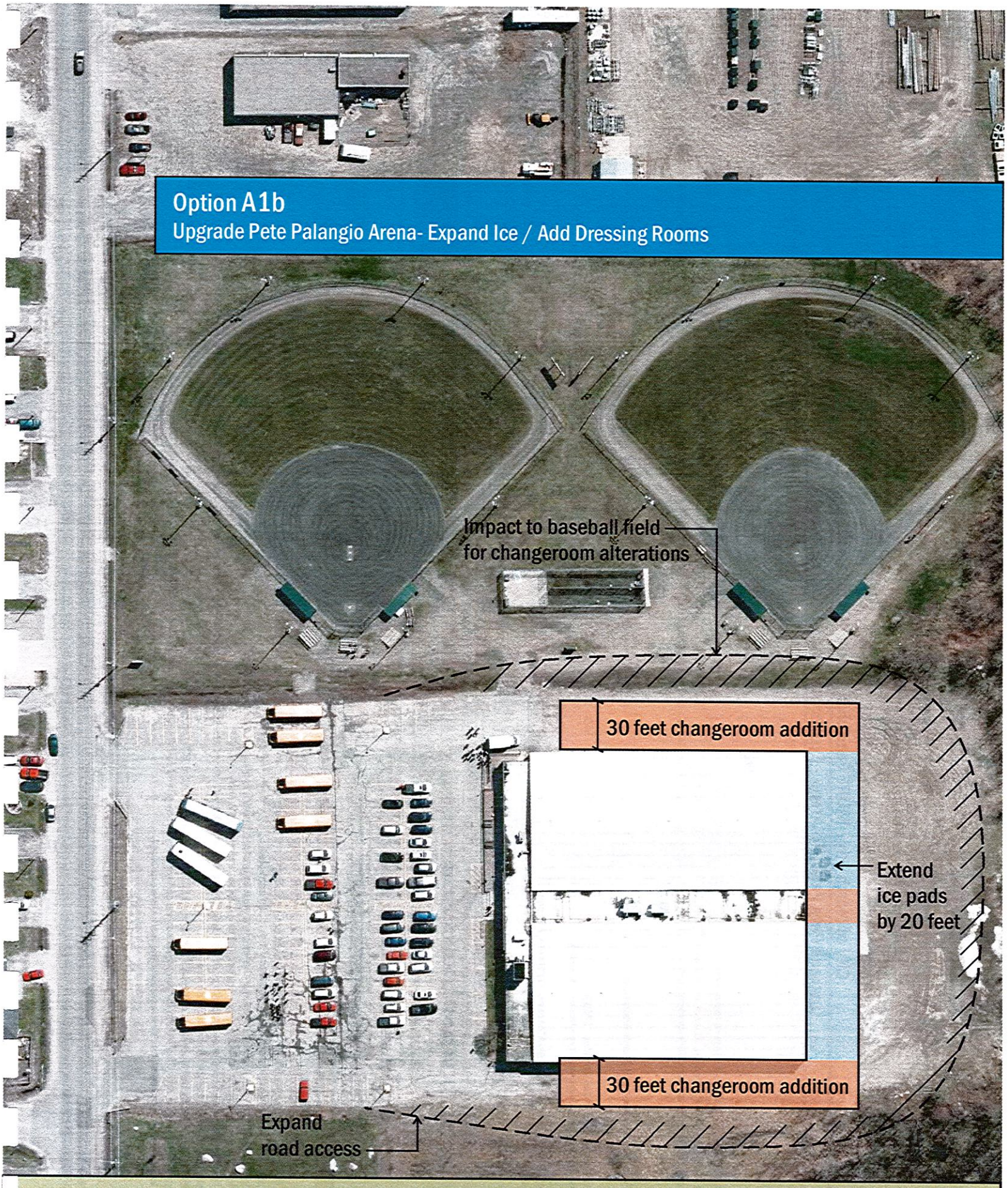
## Memorial Gardens - Ice Expansion / Dressing Room Addition

| | Unit | Cost | |
|---|---|---|---|
| **Expand Ice Surface by 10 feet South / Improve Seating** | | | |
| *1. New back of house* | $ 350 | $ 1,050,000 | **Allow for 3000sf of new space** |
| *2. Ice Expansion -10'-0" - New boards, extend ice pad* | $ 1 | $ 600,000 | **LS amount - based on using existing ice plant** |
| *3. Structure / Expansion etc... for new seating* | $ 300 | $ 900,000 | |
| *4. Remove and Replace seating in facility - $140.00 each* | $ 140 | $ 392,000 | **3324 Existing Seats - 12% Reduction for 20" seat = 2900 seats** |
| *5. Add new seating for expanded 10'-0" - Estimate 400 seats* | $ 125 | $ 50,000 | **Allowance per seat for new seating in extended area** |
| **Add 2 Dressing Rooms and Corridor - 2000sf** | $ 350 | $ 700,000 | **750sf per room, washroom, shower and corridor space** |
| **Added Parking, maintenance road, storm sewers, etc...** | $ 3,000 | $ 750,000 | **250 spaces** |

| | | |
|---|---|---|
| **TOTAL HARD COST BUDGET:** | $ 4,442,000 | |
| **ADD TO BUDGET FOR SOFT COSTS @ 15%:** | $ 666,300 | **Engineering, levies, site development, etc.. Included** |
| **Escalation to completion @ 2.5%** | $ 127,708 | **Calculated for 1 year only** |
| **DESIGN AND CONSTRUCTION CONTINGENCY @ 15%:** | $ 785,401 | **Calculated at 15% of Project Budget** |
| **TOTAL PROJECT BUDGET (NOT INCLUDING HST):** | **$ 6,021,409** | **Add HST as paid by City of North Bay** |

CLARIFICATIONS

1 Soils investigation on site could have a significant impact to the costing and schedule of the works. Budget based on shallow footing design
2 **Infrastructure and site development in the above is a very rough estimate. Proximity of services, number of parking spaces, etc... need to be determined to facilitate a further review and more detailed review and estimate**
3 Consulting fees, building permit costs, site development levies, etc... are included within the 15% soft cost
4 Cost for schedule acceleration for early opening not included. Timing of work to be determined and costs associated calculated and in addition to above. **(If required)**
5 All estimates would be before taxes and are in 2012 dollars
6 Ice expansion based on recommendation for complete removal and replacement to extend surface. Concerns with extending piping and encountering issues with breaking piping and being unable to complete the work were expressed.


Option A1b
Upgrade Pete Palangio Arena- Expand Ice / Add Dressing Rooms
Impact to baseball field for changeroom alterations
30 feet changeroom addition
Extend ice pads by 20 feet
30 feet changeroom addition
Expand road access

# City of North Bay - MURF Feasibility Study - Option A1b

## Upgrade Pete Palangio Arena - Expand Ice / Add Dressing Rooms

| | Unit | | Cost | |
|---|---|---|---|---|
| **Expand Existing 180'x80' Ice Surface to regulation** | | | | |
| *1. Ice Expansion -20'-0" in length. Cannot expand width* [Note 1] | LS | $ | 1,200,000 | LS amount - based on using existing ice plant |
| *2. Expand building to accommodate ice expansion* | $ 350 | $ | 1,925,000 | Based on 5500sf |
| **Site Expansion/Roadway and Access Alterations** | LS | $ | 400,000 | |
| **Add 12 Change Rooms and Corridor - 12000sf** | $ 350 | $ | 4,200,000 | |
| *1. Change Rooms to be located behind players benches at same level.* | | | | |
| **Renovate Interiors at Entry/Lobby/Concessions/Viewing/Display** | $ 120 | $ | 660,000 | Estimate 5500sf of renovated space |
| *See Note 5* | | | | |
| **TOTAL HARD COST BUDGET:** | | $ | 8,385,000 | |
| **ADD TO BUDGET FOR SOFT COSTS @ 15%:** | | $ | 1,257,750 | Engineering, levies, site development, etc.. Included |
| **Escalation to completion @ 2.5%** | | $ | 241,069 | Calculated for 1 year only |
| **DESIGN AND CONSTRUCTION CONTINGENCY @ 15%:** | | $ | 1,482,573 | Calculated at 15% of Project Budget |
| **TOTAL PROJECT BUDGET (NOT INCLUDING HST):** | | $ | 11,366,392 | Add HST as paid by City of North Bay |

CLARIFICATIONS

1 Ice width cannot be expanded as it affects the overall structure of the facility thereby challenging any feasibility for the work.
2 Soils investigation on site could have a significant impact to the costing and schedule of the works. Budget based on shallow footing design
3 Infrastructure and site development in the above is a very rough estimate.
4 Ice plant can accommodate expansion however the ice plant must be licensed through application as a "Large Plant".
5 Interior renovations assume replacement of finishes, lighting systems, and glazing at entry.
6 Cost for schedule acceleration for early opening not included. Timing of work to be determined and costs associated calculated and in addition to above. **(If required)**
7 All estimates would be before taxes in 2012 dollars
8 Consulting fees, building permit costs, site development levies, etc... are included within the 15% soft cost
9 Ice expansion based on recommendation for complete removal and replacement to extend surface. Concerns with extending piping and encountering issues with breaking piping and being unable to complete the work were expressed.

## Option A1c

Upgrade West Ferris Community Centre- Expand Ice / Expand Dressing Rooms

# City of North Bay - MURF Feasibility Study - Option A1c

## Upgrade West Ferris Community Centre - Expand Ice / Expand Dressing Rooms

| | Unit / ft2 | | Cost | |
|---|---|---|---|---|
| **Expand Existing 180'x80' Ice Surface to regulation** | | | | |
| *1. Ice Expansion -20'-0" in length. Cannot expand width* [Note 1&9] | LS | $ | 600,000 | |
| *2. Replace Ice Plant* [Note 4] | LS | $ | 450,000 | |
| *3. Expand building to accommodate ice expansion* | $ 350 | $ | 1,172,500 | **Based on 3350sf** |
| **Site Expansion/Roadway and Access Alterations** | LS | $ | 450,000 | |
| **Renovate and Expand 4 Change Rooms - 1000sf** | | | | |
| *1. Change Rooms to be renovated and expanded with improved washrooms.* | $ 350 | $ | 350,000 | |
| *2. Interior finishes and benches to be replaced. 5th - end change room to remain* | $ 80 | $ | 320,000 | |
| *3. Expand width of corridor to dressing rooms from 1200mm to 1800mm* | $ 250 | $ | 1,125,000 | **Based on 4500sf Full Renovation and Addition** |
| **Renovate Interiors at Entry/Lobby/Concessions/Viewing/Display** | | | | |
| *1. 1700 ft2 of space is the estimated area to be renovated.* | $ 120 | $ | 204,000 | |
| *See Note 5* | | | | |
| **TOTAL HARD COST BUDGET:** | | $ | 4,671,500 | |
| **ADD TO BUDGET FOR SOFT COSTS @ 15%:** | | $ | 700,725 | **Engineering, levies, soils, legal, etc.. Included** |
| **Escalation to completion @ 2.5%** | | $ | 134,306 | **Calculated for 1 year only** |
| **DESIGN AND CONSTRUCTION CONTINGENCY @ 15%:** | | $ | 825,980 | **Calculated at 15% of Project Budget** |
| **TOTAL PROJECT BUDGET (NOT INCLUDING HST):** | | $ | 6,332,510 | **Add HST as paid by City of North Bay** |

### CLARIFICATIONS

1 Ice width cannot be expanded as it affects the overall structure of the facility thereby challenging any feasibility for the work.
2 Soils investigation on site could have a significant impact to the costing and schedule of the works. Budget based on shallow footing design
3 Infrastructure and site development in the above is a very rough estimate.
4 Ice plant cannot accommodate expansion and must be replaced significantly impacting the feasibility of this option.
5 Interior renovations assume replacement of finishes, lighting systems, and glazing at entry.
6 Cost for schedule acceleration for early opening not included. Timing of work to be determined and costs associated calculated and in addition to above. **(If required)**
7 Consulting fees, building permit costs, site development levies, etc... are included within the 15% soft cost
8 All estimates would be before taxes in 2012 dollars
9 Ice expansion based on recommendation for complete removal and replacement to extend surface. Concerns with extending piping and encountering issues with breaking piping and being unable to complete the work were expressed.

## Option A2
### Replace Pete Palangio Area with New Twin Pad Facility (Location to be Determined)

# City of North Bay - MURF Feasibility Study - Option A2

## Replace Pete Palangio Arena with New Twin Pad Facility (Location to be Determined)

| | | Unit | | Cost | |
|---|---|---|---|---|---|
| **Decommission Existing Pete Palangio Twin Pad Facility** | | | | | |
| *1. Decommissioning* | LS | | $ | 60,000 | |
| *2. Demolition - Approximately 42,000sf (Palangio) existing space* | $ | 11 | $ | 462,000 | |
| *3. Abatement* | LS | | $ | 200,000 | |
| **Property Acquisition Costs for New Facility** | | | $ | - | **To be Determined by City** |
| **Construct New Twin Pad Facility**<br>*Includes the following main program elements: 2 ice pads, **12 Change Rooms** with Washrooms, Showers, Entry, Lobby, Display, Concessions, Offices, Large Meeting Room, Small Meeting Room, Public Washrooms, Viewing for 175/ice sheet, Referee Change Area, Storage, Mechanical/Electrical Support Spaces* | $ | 240 | $ | 18,960,000 | **Based on 79,000sf** |
| **Add walking track inside new facility** | LS | | $ | 500,000 | |
| **Site Expansion/Roadway and Access Alterations** | $ | 3,000 | $ | 750,000 | **Allow for 250 spaces.** |
| **TOTAL HARD COST BUDGET:** | | | $ | 20,932,000 | |
| **ADD TO BUDGET FOR SOFT COSTS @ 12%:** | | | $ | 2,511,840 | **Engineering, levies, soils, legal, etc.. Included** |
| **Escalation to completion @ 2.5%** | | | $ | 586,096 | **Calculated for 1 year only** |
| **DESIGN AND CONSTRUCTION CONTINGENCY @ 10%:** | | | $ | 2,402,994 | **Calculated at 10% of Project Budget** |
| **TOTAL PROJECT BUDGET (NOT INCLUDING HST):** | | | $ | 26,432,930 | **Add HST as paid by City of North Bay** |

CLARIFICATIONS

1 Soils investigation on site could have a significant impact to the costing and schedule of the works. Budget based on shallow footing design
2 Infrastructure and site development in the above is a very rough estimate.
3 Interior renovations assume replacement of finishes, lighting systems, and glazing at entry.
4 Cost for schedule acceleration for early opening not included. Timing of work to be determined and costs associated calculated and in addition to above. **(If required)**
5 Consulting fees, building permit costs, site development levies, etc... are included within the 12% soft cost
6 All estimates would be before taxes in 2012 dollars

## Option A2
Replace Pete Palangio Area with New Twin Pad Facility (Location to be Determined)

# City of North Bay - MURF Feasibility Study - Option A2

## Replace Pete Palangio Arena with New Twin Pad Facility (Location to be Determined)

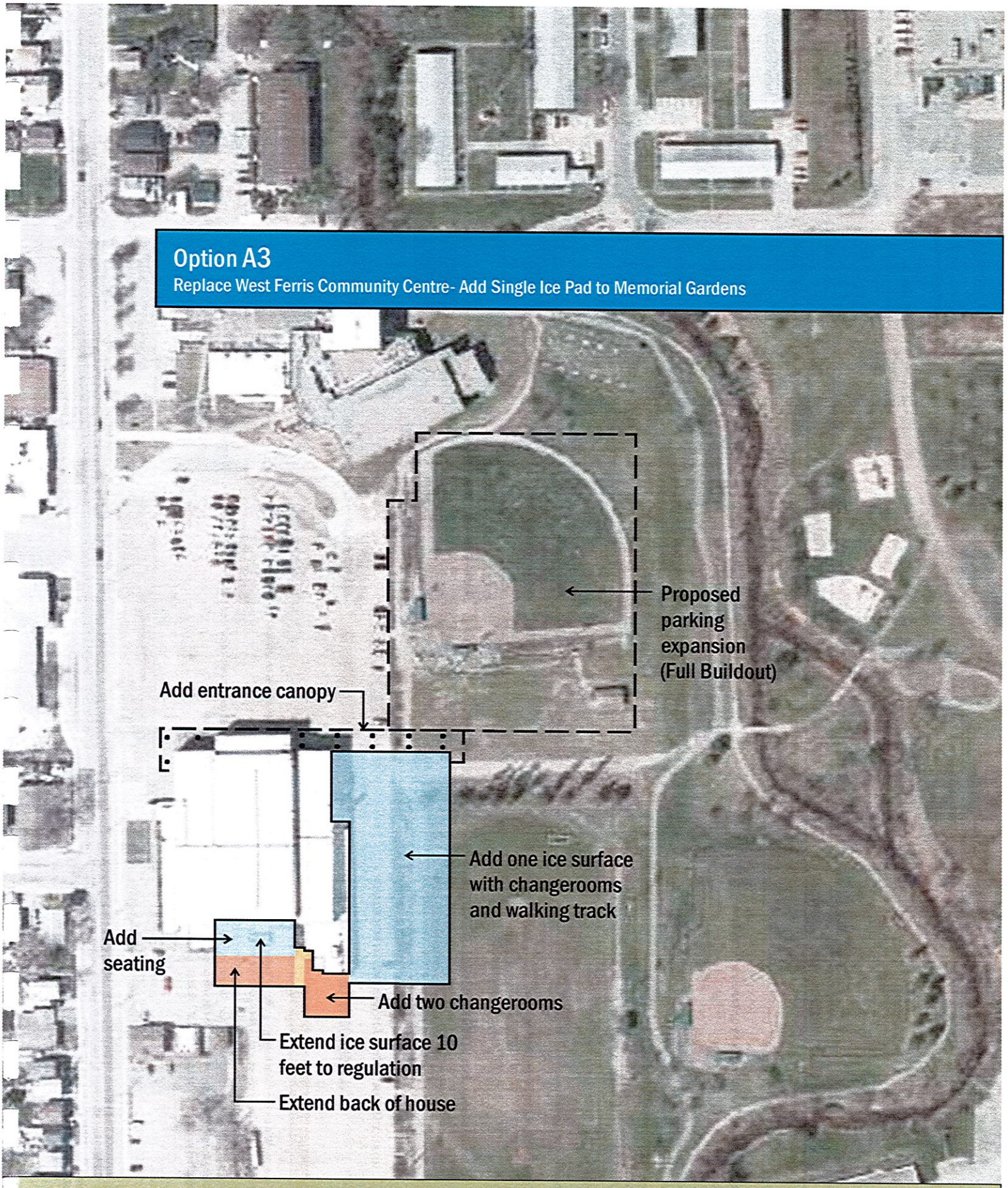
| | | Unit | | Cost | |
|---|---|---|---|---|---|
| **Decommission Existing Pete Palangio Twin Pad Facility** | | | | | |
| *1. Decommissioning* | LS | | $ | 60,000 | |
| *2. Demolition - Approximately 42,000sf (Palangio) existing space* | $ | 11 | $ | 462,000 | |
| *3. Abatement* | LS | | $ | 200,000 | |
| **Property Acquisition Costs for New Facility** | | | $ | - | **To be Determined by City** |
| **Construct New Twin Pad Facility**<br>*Includes the following main program elements: 2 ice pads, 12 Change Rooms with Washrooms, Showers, Entry, Lobby, Display, Concessions, Offices, Large Meeting Room, Small Meeting Room, Public Washrooms, Viewing for 175/ice sheet, Referee Change Area, Storage, Mechanical/Electrical Support Spaces* | $ | 240 | $ | 18,960,000 | **Based on 79,000sf** |
| **Add walking track inside new facility** | LS | | $ | 500,000 | |
| **Site Expansion/Roadway and Access Alterations** | $ | 3,000 | $ | 750,000 | **Allow for 250 spaces.** |
| **TOTAL HARD COST BUDGET:** | | | $ | 20,932,000 | |
| **ADD TO BUDGET FOR SOFT COSTS @ 12%:** | | | $ | 2,511,840 | **Engineering, levies, soils, legal, etc.. Included** |
| **Escalation to completion @ 2.5%** | | | $ | 586,096 | **Calculated for 1 year only** |
| **DESIGN AND CONSTRUCTION CONTINGENCY @ 10%:** | | | $ | 2,402,994 | **Calculated at 10% of Project Budget** |
| **TOTAL PROJECT BUDGET (NOT INCLUDING HST):** | | | $ | 26,432,930 | **Add HST as paid by City of North Bay** |

CLARIFICATIONS

1 Soils investigation on site could have a significant impact to the costing and schedule of the works. Budget based on shallow footing design
2 Infrastructure and site development in the above is a very rough estimate.
3 Interior renovations assume replacement of finishes, lighting systems, and glazing at entry.
4 Cost for schedule acceleration for early opening not included. Timing of work to be determined and costs associated calculated and in addition to above. **(If required)**
5 Consulting fees, building permit costs, site development levies, etc... are included within the 12% soft cost
6 All estimates would be before taxes in 2012 dollars

## Option A3

Replace West Ferris Community Centre- Add Single Ice Pad to Memorial Gardens



# City of North Bay - MURF Feasibility Study - Option A3

## Replace West Ferris Community Centre - Add Single Ice Pad to Memorial Gardens

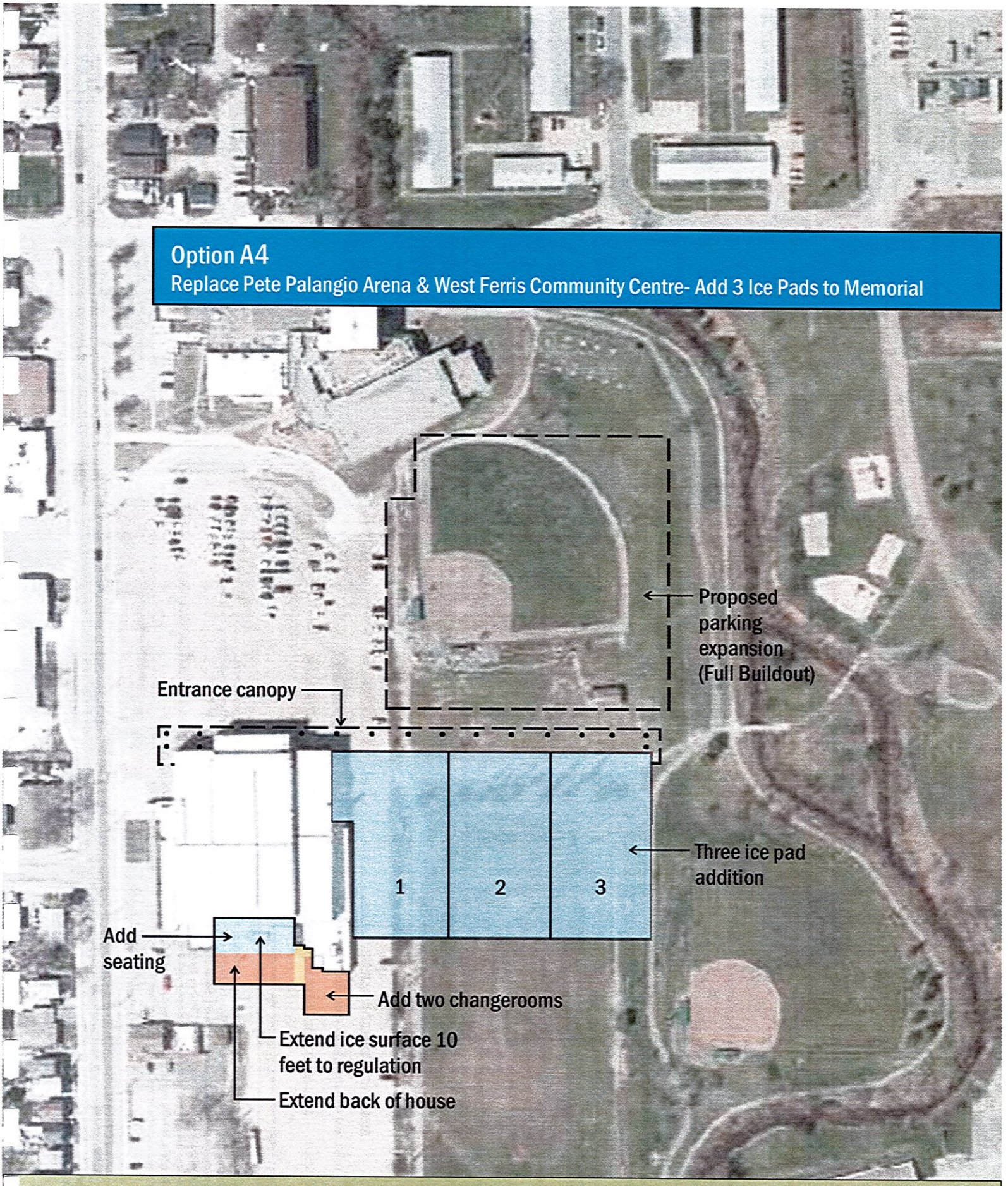
| | | Unit / ft2 | | Cost | |
|---|---|---|---|---|---|
| **Decommission West Ferris Community Centre (Building to Remain)** | | | | | |
| *1. Decommissioning Costs* | | | $ | 30,000 | |
| **Site Expansion/Roadway and Expand Parking at Memorial Site**<br>*Allowed 250 spots for preliminary review at $3000 / spot.* | $ | 3,000 | $ | 750,000 | |
| **Add Single Ice Pad to Memorial Gardens**<br>*The following main elements are as follows: Increase ice plant, Add 6 Change rooms, Add Public Washrooms, Add seating for 175-200 persons.* | $ | 250 | $ | 9,625,000 | **Allowed 38500 ft2** |
| **Add walking track inside new facility** | LS | | $ | 500,000 | |
| **Connect Interior Circulation of Memorial to new Ice Pad** | $ | 225 | $ | 900,000 | **Allowed 4000 ft2** |
| **Add Covered Exterior Walkway/Canopy** | $ | 75 | $ | 555,000 | **370' long x 20' Wide** |
| **TOTAL HARD COST BUDGET:** | | | $ | 12,360,000 | |
| **ADD TO BUDGET FOR SOFT COSTS @ 12%:** | | | $ | 1,483,200 | **Engineering, levies, soils, legal, etc.. Included** |
| **Escalation to completion @ 2.5%** | | | $ | 346,080 | **Calculated for 1 year only** |
| **DESIGN AND CONSTRUCTION CONTINGENCY @ 10%:** | | | $ | 1,418,928 | **Calculated at 10% of Project Budget** |
| **TOTAL COST FROM OPTION A1A REQUIRED TO BE INCLUDED** | | | $ | 6,021,409 | |
| **TOTAL PROJECT BUDGET (NOT INCLUDING HST):** | | | $ | 21,629,617 | **Add HST as paid by City of North Bay** |

CLARIFICATIONS

1 Soils investigation on site could have a significant impact to the costing and schedule of the works. Budget based on shallow footing design
2 Infrastructure and site development in the above is a very rough estimate.
3 Separate Ice plant required to accommodate expansion - possibly enlarge existing ice plant.
4 Cost for schedule acceleration for early opening not included. Timing of work to be determined and costs associated calculated and in addition to above. **(If required)**
5 Consulting fees, building permit costs, site development levies, etc... are included within the 12% soft cost
6 All estimates would be before taxes in 2012 dollars

## Option A4

Replace Pete Palangio Arena & West Ferris Community Centre- Add 3 Ice Pads to Memorial



## City of North Bay - MURF Feasibility Study - Option A4

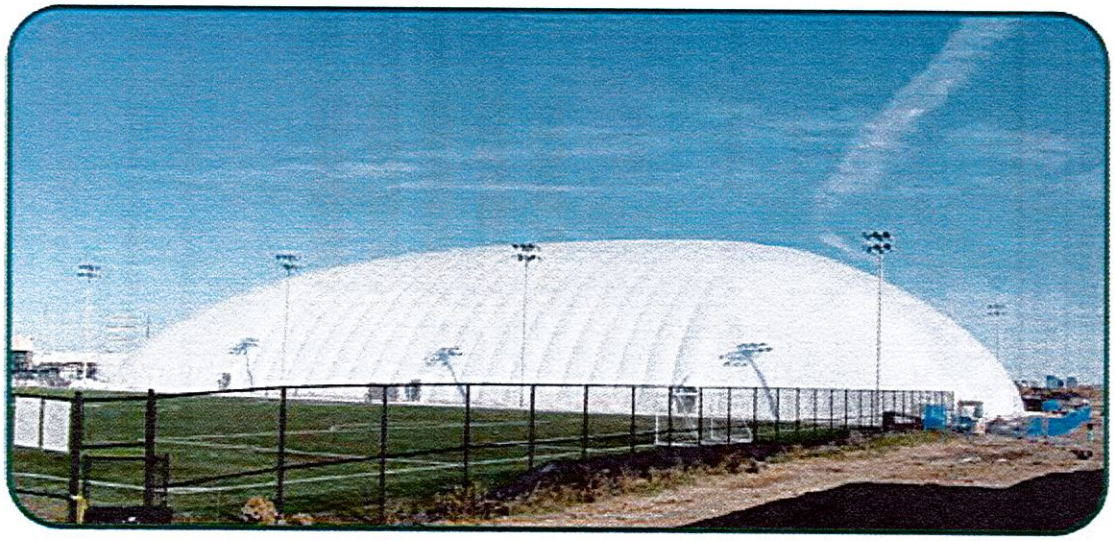
## Replace Pete Palangio Arena and West Ferris Community Centre - Add 3 Ice Pads to Memorial

| | | Unit / ft2 | | Cost | |
|---|---|---|---|---|---|
| **Decommission West Ferris Community Centre & Pete Palangio** | | | | | |
| *1. Decommissioning Costs* | LS | | $ | 90,000 | |
| *2. Demolition - Approximately 42,000sf (Palangio) existing space* | $ | 11 | $ | 462,000 | Including costs in budget to be discussed. |
| *3. Abatement* | LS | | $ | 150,000 | To be discussed at review meeting |
| **Site Expansion/Roadway and Expand Parking at Memorial Site**<br>*Allowed 500 spots for preliminary review at $3000/ spot.* | $ | 3,000 | $ | 1,500,000 | To be discussed at review meeting |
| **Add Triple Ice Pad to Memorial Gardens**<br>*The following main elements are as follows: Increase ice plant, Add 18 Change rooms, Add Public Washrooms, Add seating for 600 persons.* | $ | 240 | $ | 27,600,000 | Based on 115000sf |
| **Connect Interior Circulation of Memorial to new Ice Pads** | $ | 225 | $ | 900,000 | Allowed 4000sf |
| **Add walking track inside new facility** | LS | | $ | 500,000 | |
| **Add Covered Exterior Walkway/Canopy** | $ | 75 | $ | 1,230,000 | 820' long x 20' Wide |
| **TOTAL HARD COST BUDGET:** | | | $ | 32,432,000 | |
| **ADD TO BUDGET FOR SOFT COSTS @ 12%:** | | | $ | 3,891,840 | Engineering, levies, soils, legal, etc.. Included |
| **Escalation to completion @ 2.5%** | | | $ | 908,096 | Calculated for 1 year only |
| **DESIGN AND CONSTRUCTION CONTINGENCY @ 10%:** | | | $ | 3,723,194 | Calculated at 10% of Project Budget |
| **TOTAL COST FROM OPTION A1A REQUIRED TO BE INCLUDED** | | | $ | 6,021,409 | |
| **TOTAL PROJECT BUDGET (NOT INCLUDING HST):** | | | $ | 46,976,538 | Add HST as paid by City of North Bay |

**CLARIFICATIONS**

1 Ice width cannot be expanded as it affects the overall structure of the facility thereby challenging any feasibility for the work.
2 Soils investigation on site could have a significant impact to the costing and schedule of the works. Budget based on shallow footing design
3 Ice plant can accommodate expansion however the ice plant must be licensed through application as a "Large Plant".
4 Interior renovations assume replacement of finishes, lighting systems, and glazing at entry.
6 Cost for schedule acceleration for early opening not included. Timing of work to be determined and costs associated calculated and in addition to above. **(If required)**
7 Consulting fees, building permit costs, site development levies, etc... are included within the 12% soft cost
8 All estimates would be before taxes in 2012 dollars

## Option B1
### New Bubble Over an Artificial Turf Field



# City of North Bay - MURF Feasibility Study - Option B1

## New Bubble Over an Artificial Turf Field

| | | Unit | | Cost | |
|---|---|---|---|---|---|
| **New Bubble Structure** | | | | | |
| *1. Includes 2 fields - 200ft x 100ft - Fabric Dome* | LS | | $ | 1,500,000 | |
| *2. Exterior concrete works - Grade Beam.* | LS | | $ | 900,000 | |
| **Amenities for Bubble** | $ | 170 | $ | 1,190,000 | **Based on 7000sf** |
| *1. Includes amenities -4 Change rooms, 3 washrooms, Office, minor corridors* | | | | | |
| **Site Expansion/Roadway and Access Alterations** | LS | | $ | 800,000 | |
| **TOTAL HARD COST BUDGET:** | | | $ | 4,390,000 | |
| **ADD TO BUDGET FOR SOFT COSTS @ 12%:** | | | $ | 526,800 | **Engineering, levies, soils, legal, etc.. Included** |
| **Escalation to completion @ 2.5%** | | | $ | 122,920 | **Calculated for 1 year only** |
| **DESIGN AND CONSTRUCTION CONTINGENCY @ 10%:** | | | $ | 503,972 | **Calculated at 10% of Project Budget** |
| **TOTAL PROJECT BUDGET (NOT INCLUDING HST):** | | | $ | 5,543,692 | **Add HST as paid by City of North Bay** |

CLARIFICATIONS

1 Soils investigation on site could have a significant impact to the costing and schedule of the works. Budget based on shallow footing design
2 Infrastructure and site development in the above is a very rough estimate.
3 Cost for schedule acceleration for early opening not included. Timing of work to be determined and costs associated calculated and in addition to above. **(If required)**
4 Consultant fees, building permit costs, site development levies, etc... are included within the 12% soft cost
5 All estimates would be before taxes and in 2012 dollars

## Option B2
### Build a Permanent Indoor Turf Facility

# City of North Bay - MURF Feasibility Study - Option B2

## Build a Permanent Indoor Turf Facility

| | | Unit | | Cost | |
|---|---|---|---|---|---|
| **New Permanent Structure**<br>*1. Includes 56000sf - 3 Washrooms - 4 Change rooms* | $ | 170 | $ | 9,520,000 | **Standard footings, minor amenities** |
| **Site Expansion/Roadway and Access Alterations** | LS | | $ | 800,000 | |
| **TOTAL HARD COST BUDGET:** | | | $ | 10,320,000 | |
| **ADD TO BUDGET FOR SOFT COSTS @ 12%:** | | | $ | 1,238,400 | **Engineering, levies, soils, legal, etc.. Included** |
| **Escalation to completion @ 2.5%** | | | $ | 288,960 | **Calculated for 1 year only** |
| **DESIGN AND CONSTRUCTION CONTINGENCY @ 10%:** | | | $ | 1,184,736 | **Calculated at 10% of Project Budget** |
| **TOTAL PROJECT BUDGET (NOT INCLUDING HST):** | | | $ | **13,032,096** | **Add HST as paid by City of North Bay** |

CLARIFICATIONS

1 Soils investigation on site could have a significant impact to the costing and schedule of the works. Budget based on shallow footing design
2 Infrastructure and site development in the above is a very rough estimate.
3 Cost for schedule acceleration for early opening not included. Timing of work to be determined and costs associated calculated and in addition to above. **(If required)**
4 Consulting fees, building permit costs, site development levies, etc... are included within the 12% soft cost
5 All estimates would be before taxes and in 2012 dollars