



# Final Draft Report

## Community Center Feasibility Study

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# EXECUTIVE SUMMARY

## Upper Merion Community Center Study



### Executive Summary

The following is a brief summary of the key sections of the Upper Merion Community Center study.

#### Market Analysis:

While the focus of this market analysis is the Upper Merion Township proper, a Secondary Service Area that represents a reasonable trade area for a possible community center has been identified.

#### Service Area Comparison Chart:

	Upper Merion Township	Secondary Service Area
<b>Population:</b>		
2000	26,863	72,939
2010	27,322	73,993
2015	27,390	74,090
<b>Households:</b>		
2000	11,575	28,950
2010	11,996	29,757
2015	12,067	29,895
<b>Families:</b>		
2000	7,137	18,341
2010	7,212	18,295
2015	7,195	18,198
<b>Average Household Size:</b>		
2000	2.30	2.38
2010	2.26	2.34
2015	2.25	2.33
<b>Ethnicity:</b>		
Hispanic	3.4%	4.3%
White	78.7%	80.5%
Black	6.1%	8.0%
American Indian	0.2%	0.2%
Asian	11.9%	8.0%
Pacific Islander	0.06%	0.05%
Other	1.1%	1.6%
Multiple	1.9%	1.6%



# EXECUTIVE SUMMARY

## Upper Merion Community Center Study



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<b>Median Age:</b>		
2000	38.3	37.4
2010	41.0	40.0
2015	42.2	40.6
<b>Median Income:</b>		
2000	\$65,373	\$63,482
2010	\$84,336	\$82,315
2015	\$97,787	\$96,904
<b>Household Budget Expenditures:</b>		
Housing	31.4%	31.5%
Entertainment & Recreation	4.9%	5.0%

### Market Conclusion:

Below are listed some of the market opportunities and challenges that exist with this project.

#### *Opportunities*

- Upper Merion does not currently have a comprehensive community center.
- There is an acute need for an outdoor aquatic center with no public pool and only one private swim club in the community.
- Virtually all of the existing indoor and outdoor pools in the market area are conventional flat water pools with none of the excitement or draw that a leisure pool can bring to a community.
- The Township is highly dependent on the use of school facilities which are not always available for community recreation due to school functions.
- None of the other townships in the immediate area have comprehensive community centers either.
- Despite the presence of a significant number of other providers in the market, the population base is large enough to support another indoor recreation facility that has a different market focus.
- The service area has a high median household income level which will help attract more users, allow for a more aggressive fee structure, and a higher level of cost recovery.





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- An indoor community center improves the quality of life in a community and often serves as an economic development engine.

### *Challenges*

- There are a significant number existing sports, fitness and aquatic facilities in the greater Upper Merion market area. Most of these facilities have a strong fitness orientation as well as other sports amenities. Several (YMCA) also have a strong family focus.
- There are also a large number of specialty facilities that emphasize indoor soccer, court sports, tennis and gymnastics.
- The school district already has two 6 lane, 25 yard indoor pools that are available for some public use.
- Finding an appropriate site to support a community center will be important. A location that allows for easy access for people throughout the service area is essential as is a location that will provide allow for quick access to major thoroughfares for other users.
- The population is older, with a lower number of families. These are demographic characteristics that are not ideal for the support and use of a public community center.
- Funding not only the development but the operation of a community center will have to be clearly defined. The facility will have to include fitness and sports amenities if the center is to have any hope of covering its operating costs every year.

### *Project Direction*

Based on the information gathered from the demographic and market analysis, the following is the recommended direction for the project.

- For the project to become a reality, it is absolutely critical that a long term plan to fund the capital construction and possibly even a yearly operational shortfall (if fitness and other sports amenities are not included) is identified. This may require non-traditional financing and/or partnerships to accomplish.
- A site that is large enough to accommodate the full facility program as well as the necessary parking will be essential. The site will also need to have easy access from throughout the market area.





- The project should serve a broad base of recreation needs from active recreation to more passive activities. It will be critical that the center has a strong multigenerational and family focus.
- Ideally the same site should be master planned to add phases in the future.

**Community Center Program:**

Utilizing the information that was gathered from the market analysis and through input from staff and the project committee, a series of program options were developed for the community center.

***Project Financial Expectations***

In order for the community center to become a reality, it will have to be a cost effective project with strong operational revenue production. Ideally the center would be able to cover its cost of operation plus contribute to the debt service for building the facility.

***Indoor Recreation Needs***

Based on information gathered from a variety of sources, including the project committee, public meetings, staff and informal surveys, the following spaces should be considered for inclusion in a community center.

1. Gymnasium
2. Indoor/outdoor pool
3. Fitness facilities
4. Performance space
5. Community rooms/meeting space
6. Arts & crafts room

***Market Opportunities***

Utilizing the information from the market analysis portion of the study the following market opportunities have been identified.

1. Gymnasium space to support existing Township recreation programs
2. Classroom/multipurpose space for recreation programming
3. Outdoor pool with a strong leisure orientation



# EXECUTIVE SUMMARY

## Upper Merion Community Center Study



### UPPER MERION RECREATIONAL CENTER FINAL PROGRAM

#### RECREATIONAL PROGRAM

ROOM NAME	NUMBER OF ROOMS			AREA	OVERALL AREA
	L	W			
GYMNASIUM	1	120	100	12,000	12,000
INDOOR TRACK	1	400	18	7,200	7,200
NATATORIUM	1	104	104	10,816	10,816
PARTY ROOMS	4	20	40	800	3,200
CARDIO AND FITNESS	2	40	90	3,600	7,200
COMMUNITY ROOM	1	40	40	1,600	1,600
CHILD WATCH	1	20	40	800	800
LOCKER ROOMS	4	20	40	800	3,200
ADMINISTRATIVE AREA REC.	1	40	30	1,200	1,200
LOBBY-RECEP.	1	20	24	480	480
POOL STORAGE	1	12	24	288	288
PHYS ED STORAGE	2	12	24	288	576
TRACK STORAGE	1	12	24	288	288
GENERAL ATHLETIC STORAGE	1	20	24	480	480
GENERAL BUILDING STORAGE	1	20	24	480	480
STAFF LOCKERS/OFFICE	2	12	12	144	288
BOILER ROOM	1	24	32	768	768
ELECTRICAL ROOM	1	24	24	576	576
POOL MECHANICAL ROOM	1	32	48	1,536	1,536
VERTICAL CIRCULATION	3	12	24	288	864
PUBLIC TOILETS	2	12	34	408	816
<b>NET AREA</b>					<b>54,656 SQFT</b>
PARTITIONS AND CHASES @2%					1,093
INTERNAL CIRCULATION @8%					4,372
<b>INTERIOR SQUARE FOOTAGE</b>					<b>60,122 SQFT</b>
EXTERIOR WALLS @ 5%					3,006
<b>GROSS SQUARE FOOTAGE</b>					<b>63,128 SQFT</b>



# EXECUTIVE SUMMARY

## Upper Merion Community Center Study



LIBRARY PROGRAM	NUMBER OF ROOMS	SIZE		AREA	OVERALL AREA
		L	W		
ADULT LIBRARY	1	88	48	4,224	4,224
TEEN LIBRARY	1	24	40	960	960
STUDY ROOM	5	8	8	64	320
CHILDRENS LIBRARY	1	88	48	4,224	4,224
CHILDRENS READING ROOM	1	24	24	576	576
CHILDRENS LIBRARY TOILETS	2	5	8	40	80
CHILDRENS LIBRARIAN	1	12	12	144	144
WORK ROOM	1	12	18	216	216
MOTHERS ROOM	1	12	12	144	144
CONFERENCE ROOM	1	12	12	144	144
CAFÉ BOOKSTORE	1	40	24	960	960
BOOK DROP	1	8	12	96	96
VESTIBULE	1	12	12	144	144
MAIN CIRCULATION DESK	1	40	20	800	800
MAIN WORK ROOM	1	24	32	768	768
MDF	1	10	10	100	100
ADMINSTRATION AREA	1	24	48	1,152	1,152
PUBLIC TOILETS	2	12	32	384	768
PROGRAM CENTER	1	40	60	2,400	2,400
PROGRAM CENTER STORAGE	1	20	16	320	320
STAGE	1	24	12	288	288
PROGRAM CENTER KITCHEN	1	16	20	320	320
VERTICAL CIRCULATION	3	12	24	288	864
BOILER ROOM	1	24	32	768	768
ELECTRICAL ROOM	1	24	24	576	576
<b>NET AREA</b>					<b>21,356 SQFT</b>
PARTITIONS AND CHASES @ 2%					427
INTERNAL CIRCULATON @ 8%					1,708
<b>INTERIOR SQUARE FOOTAGE</b>					<b>23,492 SQFT</b>
EXTERIOR WALLS @ 5%					1,175
<b>GROSS SQUARE FOOTAGE</b>					<b>24,666 SQFT</b>
<b>OVERALL BUILDING AREA</b>					<b>87,794 SQFT</b>





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**Site/Concept/Cost Analysis:**

Based on the final program that was developed for the project, Kimmel Bogrette Architecture + Site completed a site analysis for three locations and developed concept plans and capital cost estimates for each.

Heuser Site Plan

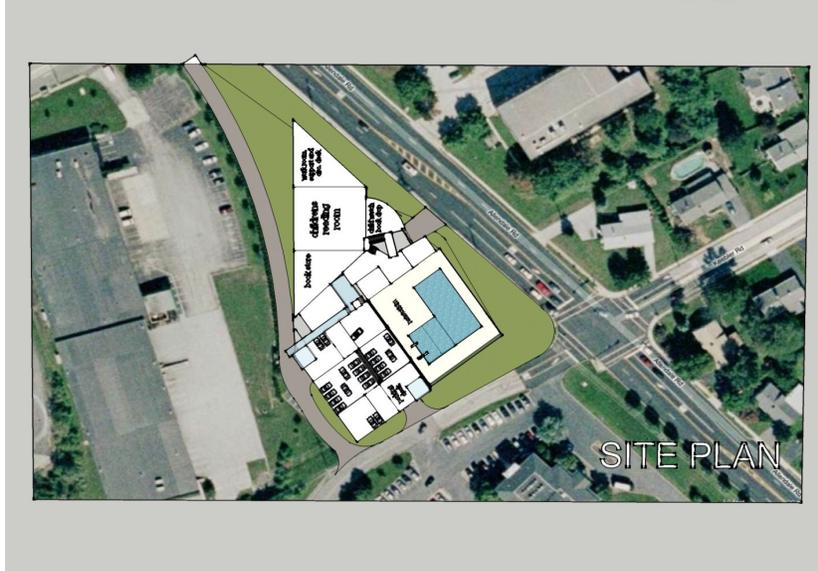


Gold's Gym Site Plan





Allendale



Cost Estimate:

Site	Construction Cost	Project Cost
Heuser Park	\$22,000,000	\$27,300,000
Gold's Gym	\$22,500,000	\$28,100,000
Allendale	\$26,500,000	\$32,700,000*

\* This does not include the cost of land/acquisition at Allendale (or other privately owned sites).

**Operations Analysis:**

An operational expenditure and revenue projection was developed for each of the three site options.

Community Center at Heuser Park Site – Option One

Category	
Expenditures	\$2,024,852
Revenues	\$2,138,955
Difference	+\$114,103
Recovery Rate	106%



# EXECUTIVE SUMMARY

## Upper Merion Community Center Study



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### Community Center at Gold's Gym Site – Option Two

Category	
Expenditures	\$2,024,852
Revenues	\$2,104,355
Difference	+\$79,503
Recovery Rate	104%

### Community Center at Allendale Site – Option Three

Category	
Expenditures	\$2,118,852
Revenues	\$2,104,355
Difference	-\$14,497
Recovery Rate	99%

### Funding Analysis:

It is anticipated that the primary source of capital dollars for the community center will be through the Township either by existing fund sources or a general obligation bond.

### Possible Bond Scenarios

Based on conversations with Township staff, these bond scenarios have been developed for the three project options based on the entire project cost being covered by the bond.

Heuser - \$27,300,000 x 4.25% bond rate for 25 years = \$1,794,010 annual payment.

Gold's Gym - \$28,100,000 x 4.25% bond rate for 25 years = \$2,113,680 annual payment.

Allendale - \$32,700,000 x 4.25% bond rate for 25 years = \$2,459,690 annual payment.



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## **Section I – Market Analysis**

Upper Merion Township is exploring the concept of developing a community center. The following market analysis looks at the demographic realities within Upper Merion Township and the surrounding area and compares them to state and national numbers. Also included is a comparison with basic sports participation standards as produced by the National Sporting Goods Association and the National Endowment for the Arts.

**Service Areas:** While the focus of this market analysis is the Upper Merion Township proper, a Secondary Service Area that represents a reasonable trade area for a possible community center has been identified.

Primary and secondary service areas are usually defined by the distance people will travel on a regular basis (a minimum of once a week) to utilize a facility or its programs. Regions beyond the Secondary Service Area are usually defined by the distance people will travel on a less consistent basis (a minimum of once a month) to utilize a facility or its programs. Use by individuals beyond the Secondary Service Area will primarily be limited to special events (swim meets, tournaments, etc.).

Service areas can also vary in size with the types of components that are included in a facility. A center with active elements (weight cardiovascular equipment area, gym, track, etc.) will generally have a larger service area than a more passively oriented facility. Specialized facilities such as a sports field house will have even larger service areas that make them more of a regional destination.

Service areas can also be based upon a facility's proximity to major thoroughfares. Other factors impacting the use as it relates to driving distance are the presence of alternative service providers in the service area. Alternative service providers can have an impact upon membership, daily admissions and the associated penetration rates for programs and services.



**Table A - Service Area Statistics & Comparison**

**Population Comparison:**

	<b>2000 Census</b>	<b>2010 Estimate</b>	<b>2015 Projection</b>
Upper Merion Township	26,863	27,322	27,390
Secondary Service Area	72,939	73,993	74,090

**Number of Households Comparison:**

	<b>2000 Census</b>	<b>2010 Estimate</b>	<b>2015 Projection</b>
Upper Merion Township	11,575	11,996	12,067
Secondary Service Area	28,950	29,757	29,895

**Number of Families Comparison:**

	<b>2000 Census</b>	<b>2010 Estimate</b>	<b>2015 Projection</b>
Upper Merion Township	7,137	7,212	7,195
Secondary Service Area	18,341	18,295	18,198

**Average Household Size Comparison**

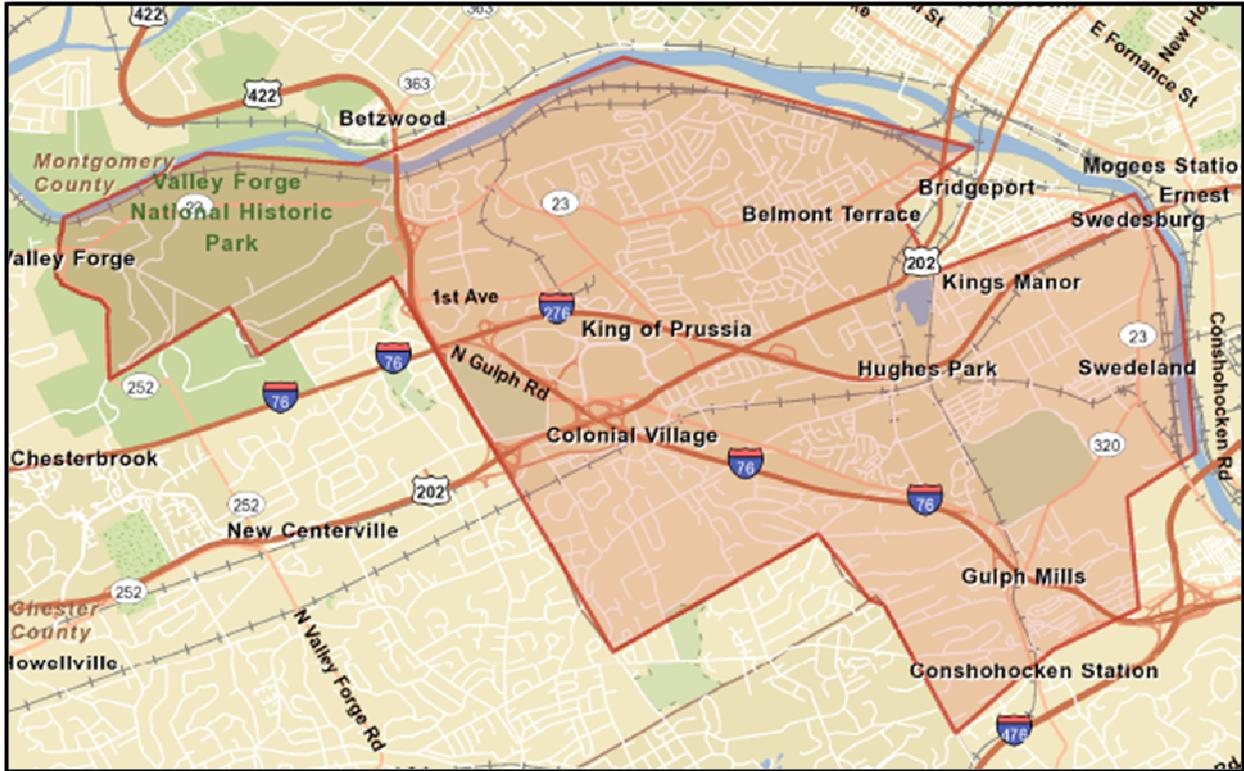
	<b>2000 Census</b>	<b>2010 Estimate</b>	<b>2015 Projection</b>
Upper Merion Township	2.30	2.26	2.25
Secondary Service Area	2.38	2.34	2.33
United States	2.59	2.59	2.60

Source – U.S. Census Bureau and ESRI





## Map A – Upper Merion Township



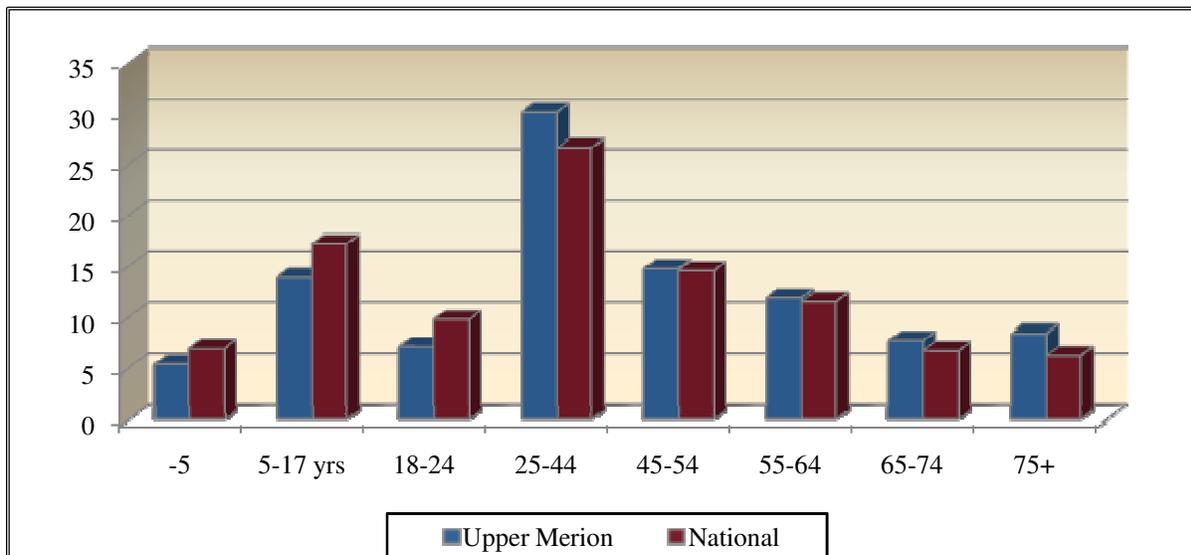
**Population Distribution by Age:** Utilizing census information for Upper Merion Township, the following comparisons are possible.

**Table B – 2010 Upper Merion Township Age Distribution**  
(ESRI estimates)

Ages	Population	% of Total	Nat. Population	Difference
-5	1,459	5.4%	7.0%	-1.6%
5-17	3,852	13.9%	17.3%	-3.4%
18-24	1,963	7.2%	9.8%	-2.6%
25-44	8,244	30.2%	26.7%	3.5%
45-54	4,055	14.8%	14.6%	0.2%
55-64	3,275	12.0%	11.6%	0.4%
65-74	2,139	7.8%	6.8%	1.0%
75+	2,335	8.5%	6.3%	2.2%

- Population:** 2010 census estimates in the different age groups in Upper Merion Township.
- % of Total:** Percentage of Upper Merion Township population in the age group.
- National Population:** Percentage of the national population in the age group.
- Difference:** Percentage difference between the Upper Merion Township population and the national population.

**Chart A – 2010 Upper Merion Township Age Group Distribution**



# MARKET ANALYSIS

*Upper Merion Community Center Study*

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The demographic makeup of Upper Merion Township, when compared to the characteristics of the national population, indicates that there are some differences with a larger population in the 25-44, 45-54, 55-64, 65-74 and 75+ age groups and a smaller population in the -5, 5-17 and 18-24 age groups. The largest positive variance is in the 25-44 age group with +3.5%, while the greatest negative variance is in the 5-17 age group with -3.4%.

**Population Distribution Comparison by Age:** Utilizing census information from Upper Merion Township, the following comparisons are possible.

**Table C – 2010 Upper Merion Township Population Estimates**  
(U.S. Census Information and ESRI)

Ages	2000 Population	2010 Population	2015 Population	Percent Change	Percent Change Nat'l
-5	1,476	1,459	1,412	-4.3%	14.0%
5-17	3,553	3,852	3,959	11.4%	4.3%
18-24	2,020	1,963	1,866	-7.6%	14.2%
25-44	9,086	8,244	7,729	-14.9%	0.0%
45-54	3,734	4,055	4,486	20.1%	14.2%
55-64	2,786	3,275	3,290	18.1%	65.7%
65-74	2,444	2,139	2,475	1.3%	45.9%
75+	1,764	2,335	2,173	23.2%	19.5%

**Chart B – Upper Merion Township Population Growth**

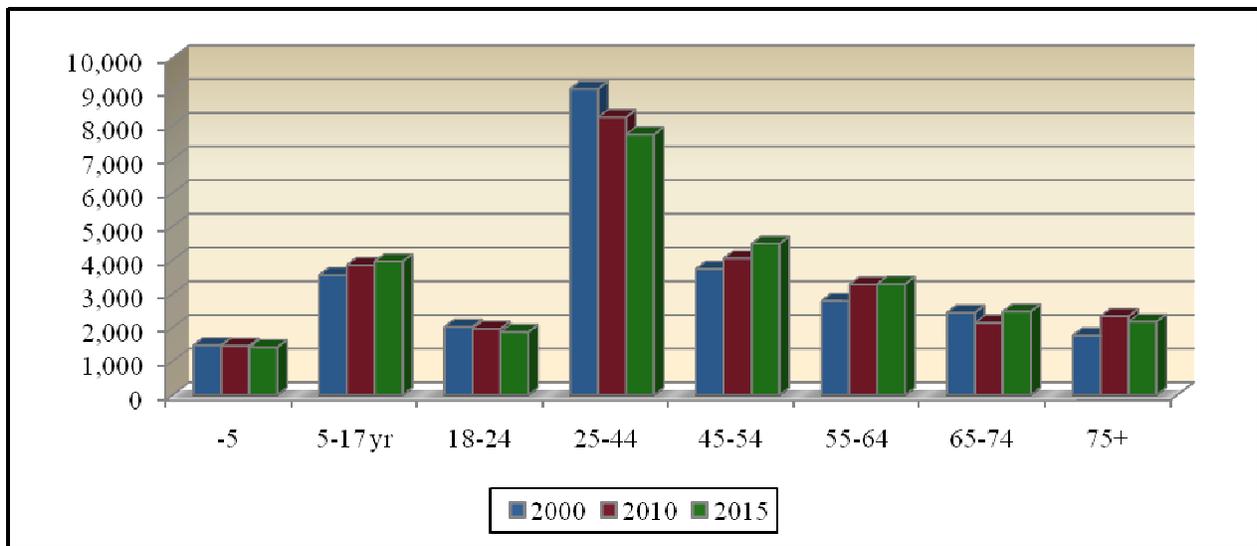


Table-C, looks at the growth or decline in age group numbers from the 2000 census until the year 2015. It is projected that all of the age categories, except -5 and 25-44, will see an increase in population. It must be remembered that the population of the United States as a whole is aging and it is not unusual to find negative growth numbers in the younger age groups and net gains nearing 45% in the 45 plus age groupings in communities which are relatively stable in their population numbers.

Below is listed the distribution of the population by race and ethnicity for Upper Merion Township based on 2010 population estimates.

**Table D – Upper Merion Township Hispanic Population and Median Age**  
(Source – U.S. Census Bureau and ESRI)

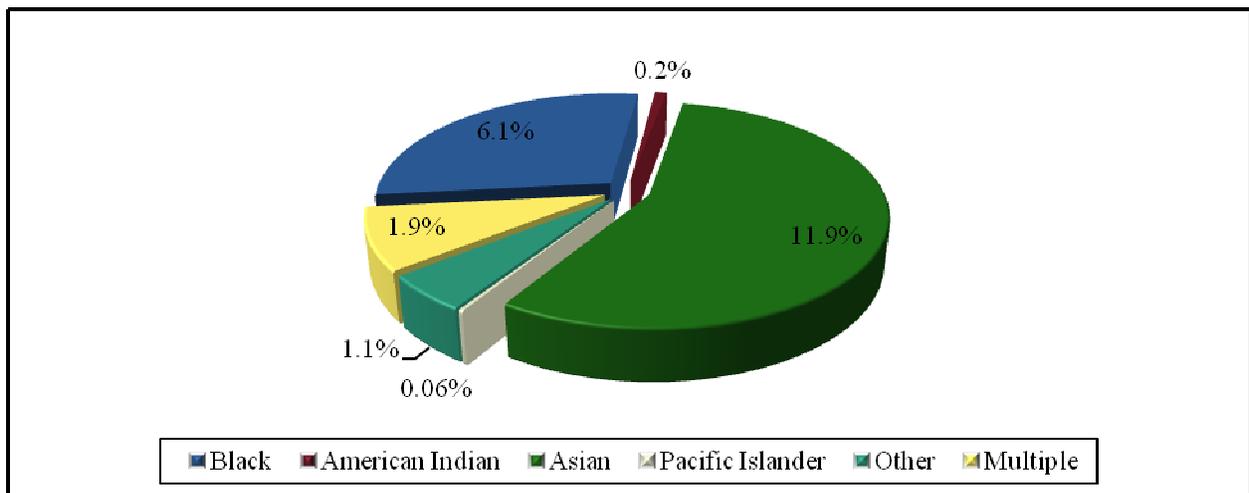
Ethnicity	Total Population	Median Age	% of Population	% of Nat'l Population
Hispanic	933	32.4	3.4%	16.2%

**Table E – Upper Merion Township Ethnic Population and Median Age**  
(Source – U.S. Census Bureau and ESRI)

Ethnicity	Total Population	Median Age	% of Population	% of Nat'l Population
White	21,503	43.4	78.7%	71.9%
Black	1,660	40.7	6.1%	12.5%
American Indian	58	38.3	0.2%	0.9%
Asian	3,258	32.8	11.9%	4.5%
Pacific Islander	16	27.5	0.06%	0.2%
Other	312	30.1	1.1%	7.0%
Multiple	515	30.1	1.9%	3.0%

2010 Primary Service Area Total Population: 27,322 Residents

**Chart C – Upper Merion Township Ethnic Population**

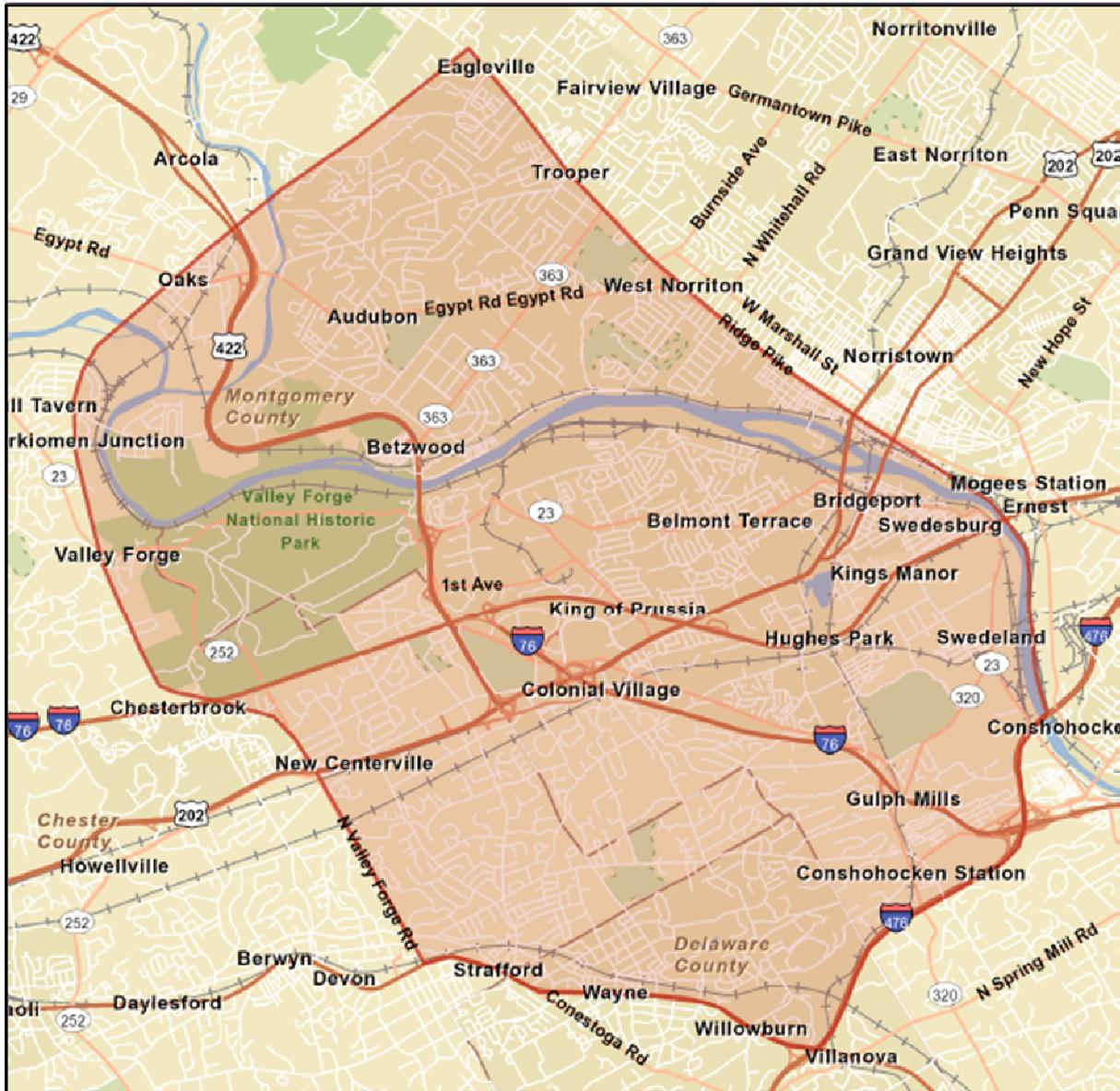


# MARKET ANALYSIS

## Upper Merion Community Center Study



**Map B – Secondary Service Area**



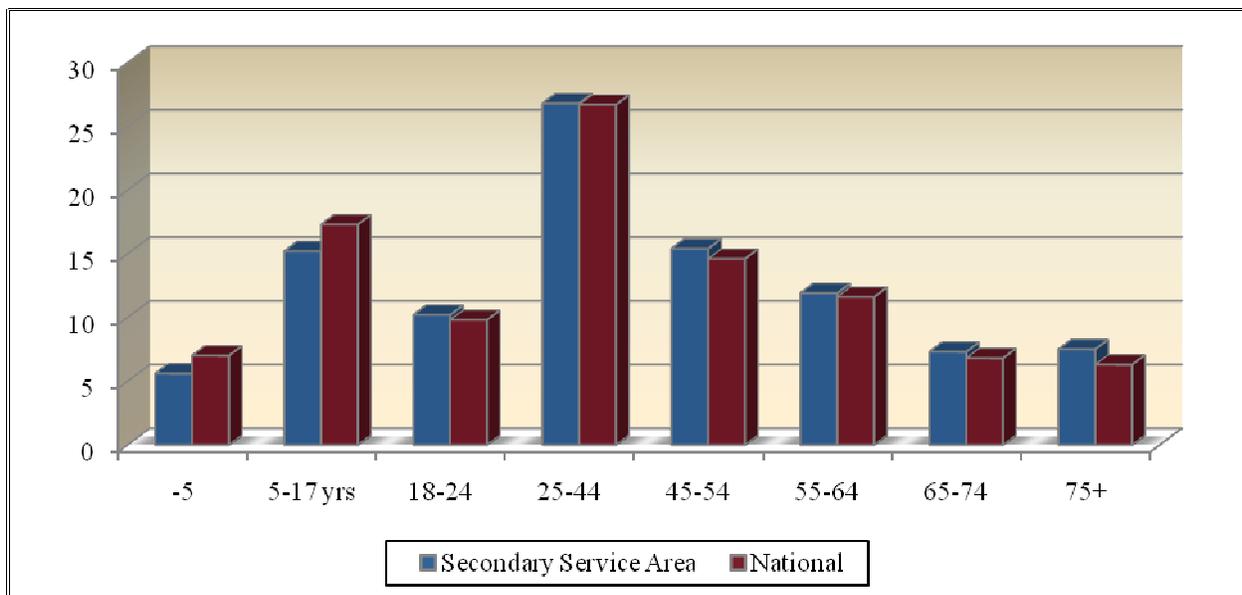
**Population Distribution by Age:** Utilizing census information for the Secondary Service Area, the following comparisons are possible.

**Table F – 2010 Secondary Service Area Age Distribution**  
(ESRI estimates)

Ages	Population	% of Total	Nat. Population	Difference
-5	4,111	5.6%	7.0%	-1.4%
5-17	11,239	15.2%	17.3%	-2.1%
18-24	7,581	10.2%	9.8%	0.4%
25-44	19,875	26.8%	26.7%	0.1%
45-54	11,385	15.4%	14.6%	0.8%
55-64	8,768	11.9%	11.6%	0.3%
65-74	5,434	7.3%	6.8%	0.5%
75+	5,599	7.5%	6.3%	1.2%

- Population:** 2010 census estimates in the different age groups in the Secondary Service Area.
- % of Total:** Percentage of the Secondary Service Area population in the age group.
- National Population:** Percentage of the national population in the age group.
- Difference:** Percentage difference between the Secondary Service Area population and the national population.

**Chart D – 2010 Secondary Service Area Age Group Distribution**



The demographic makeup of the Secondary Service Area, when compared to the characteristics of the national population, indicates that there are some differences with a larger population in the 18-24, 25-44, 45-54, 55-64, 65-74 and 75+ age groups and a smaller population in the -5 and 5-17 age groups. The largest positive variance is in the 75+ age group with +1.2%, while the greatest negative variance is in the 5-17 age group with -2.1%.

**Population Distribution Comparison by Age:** Utilizing census information from the Secondary Service Area, the following comparisons are possible.

**Table G – 2010 Secondary Service Area Population Estimates**  
 (U.S. Census Information and ESRI)

Ages	2000 Population	2010 Population	2015 Population	Percent Change	Percent Change Nat'l
-5	4,248	4,111	3,998	-5.9%	14.0%
5-17	11,044	11,239	11,185	1.3%	4.3%
18-24	6,888	7,581	7,502	8.9%	14.2%
25-44	23,387	19,875	18,944	-19.0%	0.0%
45-54	10,010	11,385	11,427	14.2%	14.2%
55-64	7,168	8,768	9,315	30.0%	65.7%
65-74	5,870	5,434	6,321	7.7%	45.9%
75+	4,323	5,599	5,401	24.9%	19.5%

**Chart E – Secondary Service Area Population Growth**

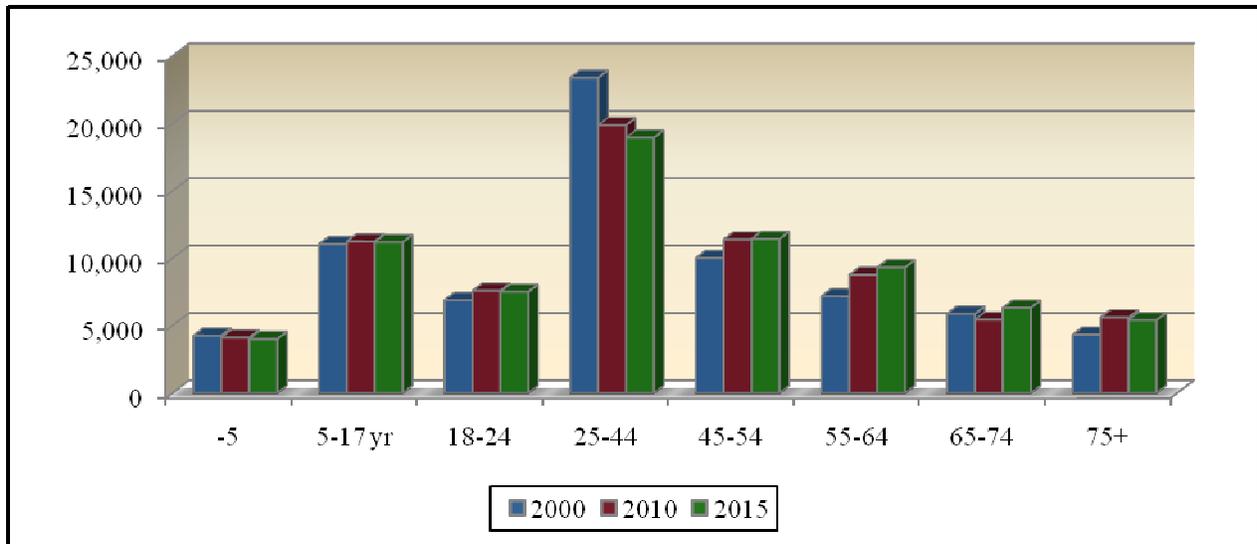


Table-G, looks at the growth or decline in age group numbers from the 2000 census until the year 2015. It is projected that all of the age categories, except -5 and 25-44, will see an increase in population. It must be remembered that the population of the United States as a whole is aging and it is not unusual to find negative growth numbers in the younger age groups and net gains nearing 45% in the 45 plus age groupings in communities which are relatively stable in their population numbers.

Below is listed the distribution of the population by race and ethnicity for the Secondary Service Area based on 2010 population estimates.

**Table H – Secondary Service Area Hispanic Population and Median Age**  
(Source – U.S. Census Bureau and ESRI)

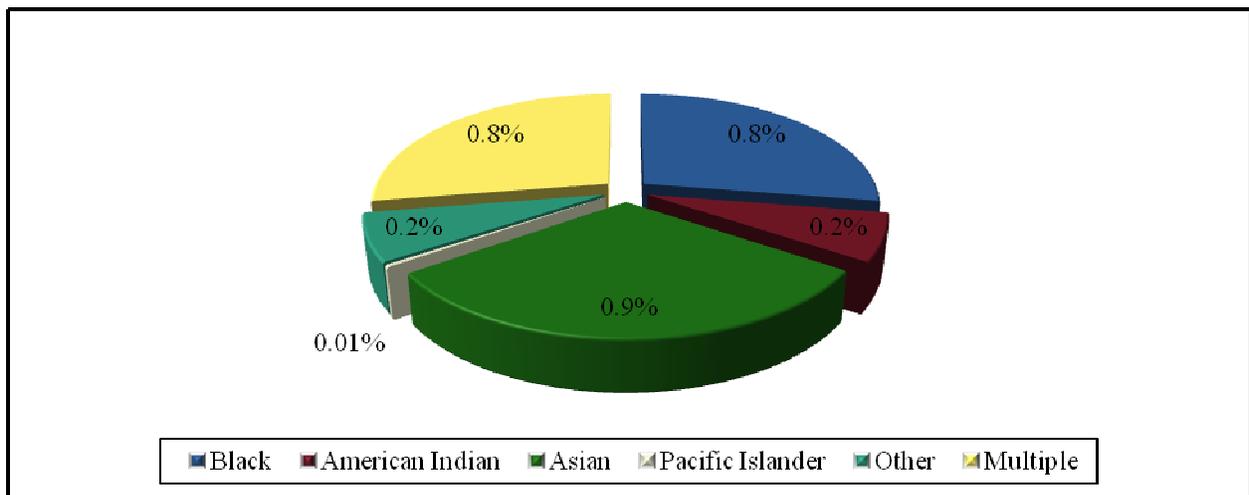
Ethnicity	Total Population	Median Age	% of Population	% of Nat'l Population
Hispanic	3,158	26.3	4.3%	16.2%

**Table I – Secondary Service Area Ethnic Population and Median Age**  
(Source – U.S. Census Bureau and ESRI)

Ethnicity	Total Population	Median Age	% of Population	% of Nat'l Population
White	59,533	42.4	80.5%	71.9%
Black	5,938	33.0	8.0%	12.5%
American Indian	140	37.0	0.2%	0.9%
Asian	5,949	32.6	8.0%	4.5%
Pacific Islander	39	32.5	0.05%	0.2%
Other	1,210	24.5	1.6%	7.0%
Multiple	1,186	22.8	1.6%	3.0%

2010 Secondary Service Area Total Population: 73,993 Residents

**Chart F – Secondary Service Area Ethnic Population**

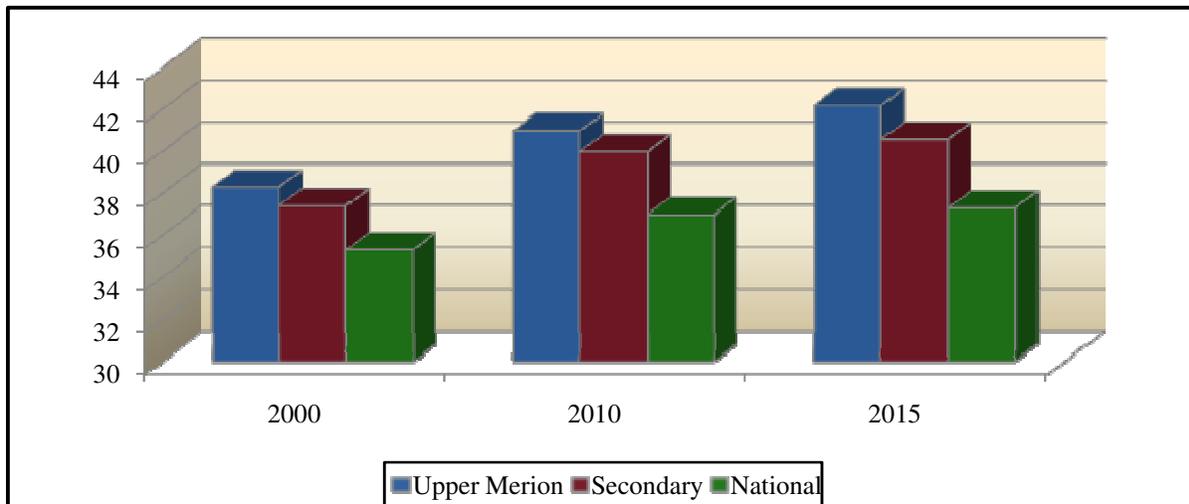


Next, the median age and household income levels are compared with the national number. Both of these factors are primary determiners of participation in recreation activities. The lower the median age, the higher the participation rates are for most activities. The level of participation also increases as the income level goes up.

**Table J - Median Age:**

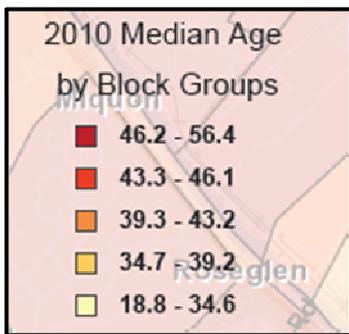
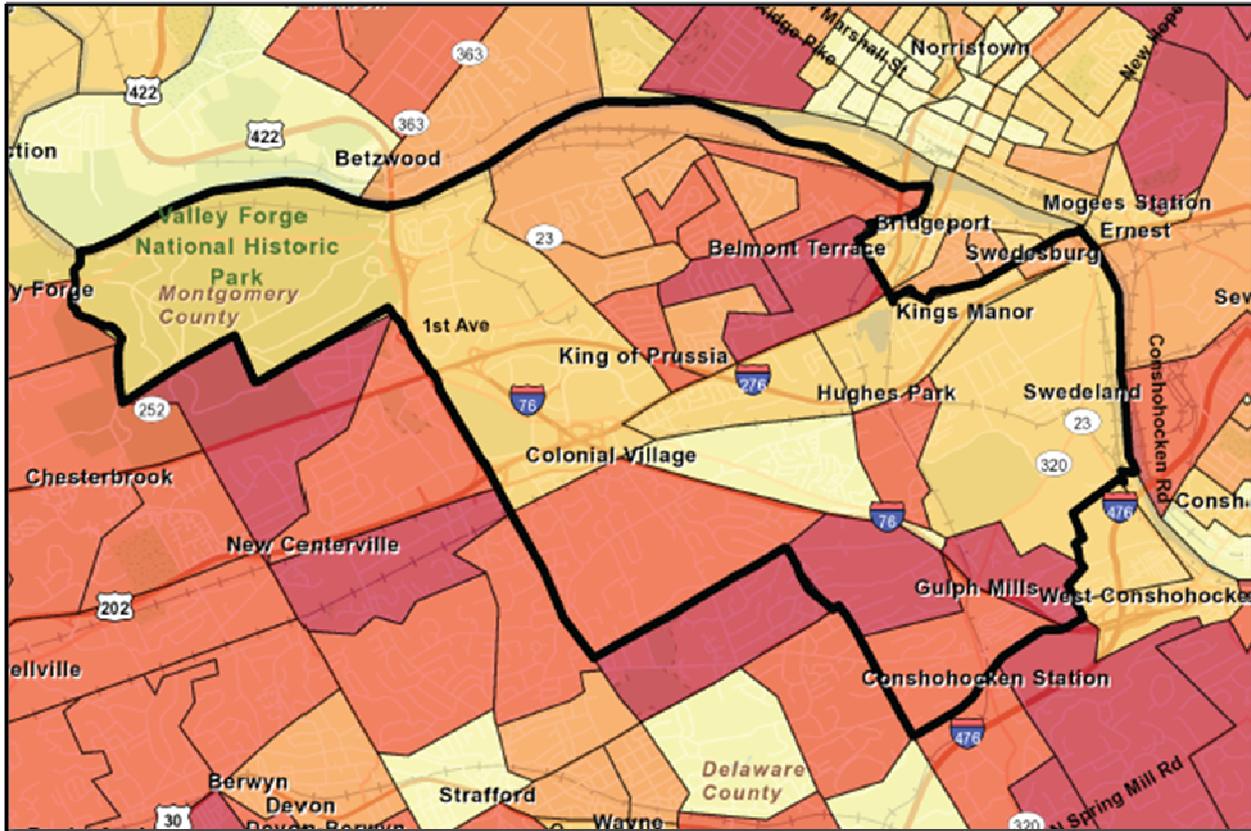
	2000 Census	2010 Estimate	2015 Projection
Upper Merion Township	38.3	41.0	42.2
Secondary Service Area	37.4	40.0	40.6
Nationally	35.3	37.0	37.3

**Chart G – Median Age**



With the median age in the Township and Secondary Service Area being above the National number it would indicate a slightly older population. It will be important to focus on facility components that will address the needs of all age groups and equally important will be the programming of the facility.

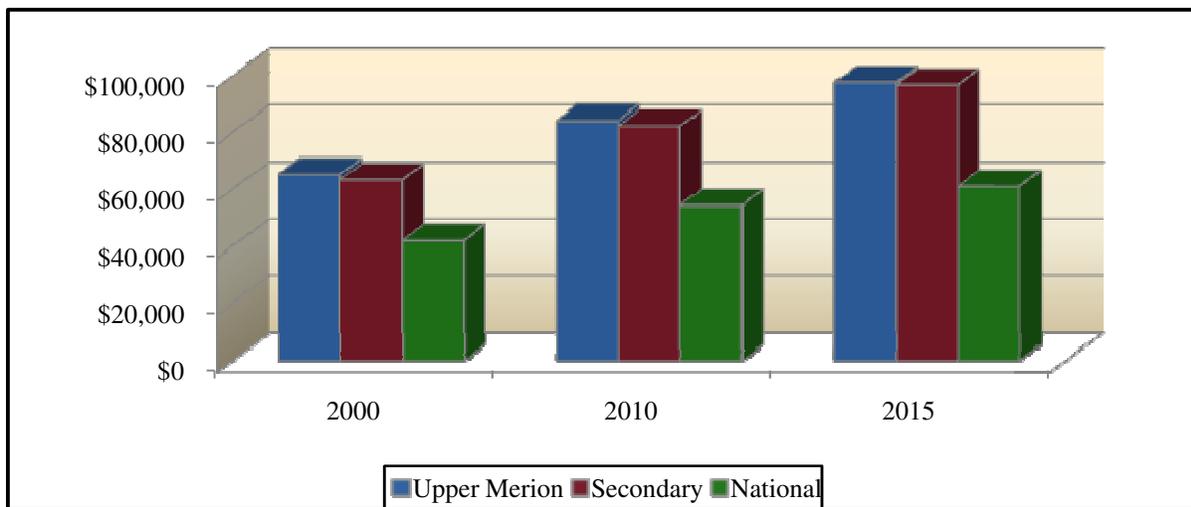
**Map C - Median Age by Census Block Groups**



**Table K - Median Household Income:**

	2000 Census	2010 Estimate	2015 Projection
Upper Merion Township	\$65,373	\$84,336	\$97,787
Secondary Service Area	\$63,482	\$82,315	\$96,904
Nationally	\$42,164	\$54,442	\$61,189

**Chart H – Median Household Income**

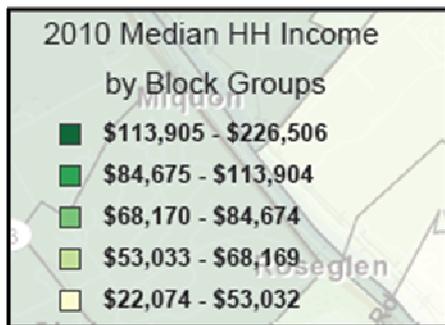
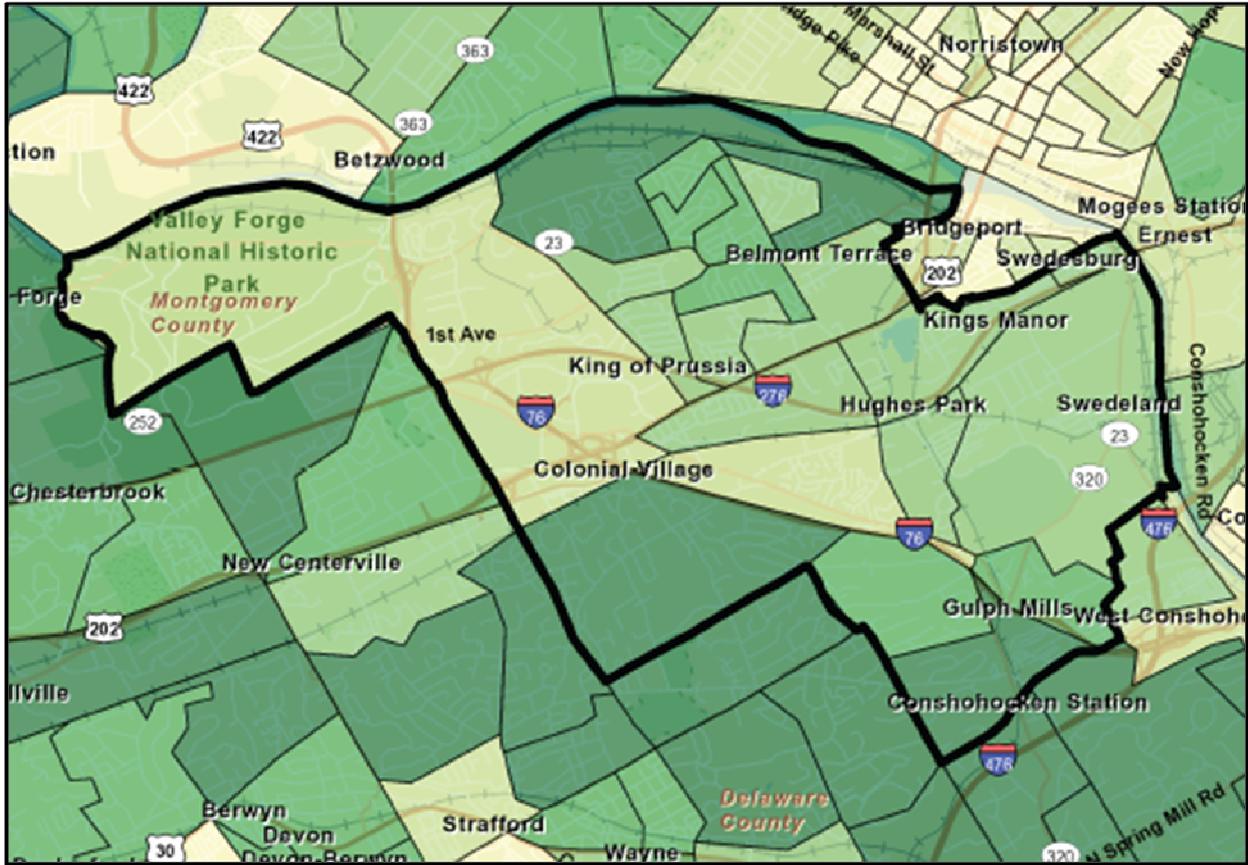


In Upper Merion Township the percentage of households with median income over \$50,000 per year is 77.6% compared to 54.5% on a national level. Furthermore, the percentage of the households in the school district with median income less than \$25,000 per year is 7.9% compared to a level of 20.7% nationally.

In the Secondary Service Area the percentage of households with median income over \$50,000 per year is 73.8% compared to 54.5% on a national level. Furthermore, the percentage of the households in the school district with median income less than \$25,000 per year is 9.5% compared to a level of 20.7% nationally.

These statistics indicate there may be a higher level of discretionary income within the Township and Secondary Service Area.

**Map D - Median Household Income by Census Block Groups**



In addition to taking a look at Median Age and Median Income, it is important to examine Household Budget Expenditures. In particular looking at housing information; shelter, utilities, fuel and public services along with entertainment & recreation can provide a snap shot into the cost of living and spending patterns in the services areas. The table below looks at that information and compares the Township and Secondary Service Area to the State of Pennsylvania.

**Table L - Household Budget Expenditures<sup>1</sup>**

Upper Merion Township	SPI	Average Amount Spent	Percent
Housing	153	\$31,019.95	31.4%
<i>Shelter</i>	<i>156</i>	<i>\$24,607.36</i>	<i>24.9%</i>
<i>Utilities, Fuel, Public Service</i>	<i>142</i>	<i>\$6,412.59</i>	<i>6.5%</i>
Entertainment & Recreation	151	\$4,868.47	4.9%

Secondary Service Area	SPI	Average Amount Spent	Percent
Housing	158	\$32,124.39	31.5%
<i>Shelter</i>	<i>162</i>	<i>\$25,515.48</i>	<i>25.0%</i>
<i>Utilities, Fuel, Public Service</i>	<i>146</i>	<i>\$6,608.91</i>	<i>6.5%</i>
Entertainment & Recreation	157	\$5,046.83	5.0%

State of Pennsylvania	SPI	Average Amount Spent	Percent
Housing	95	\$19,257.13	30.4%
<i>Shelter</i>	<i>94</i>	<i>\$14,767.78</i>	<i>23.3%</i>
<i>Utilities, Fuel, Public Service</i>	<i>99</i>	<i>\$4,489.35</i>	<i>7.1%</i>
Entertainment & Recreation	97	\$3,141.95	5.0%

**SPI:** Spending Potential Index as compared to the National number of 100.

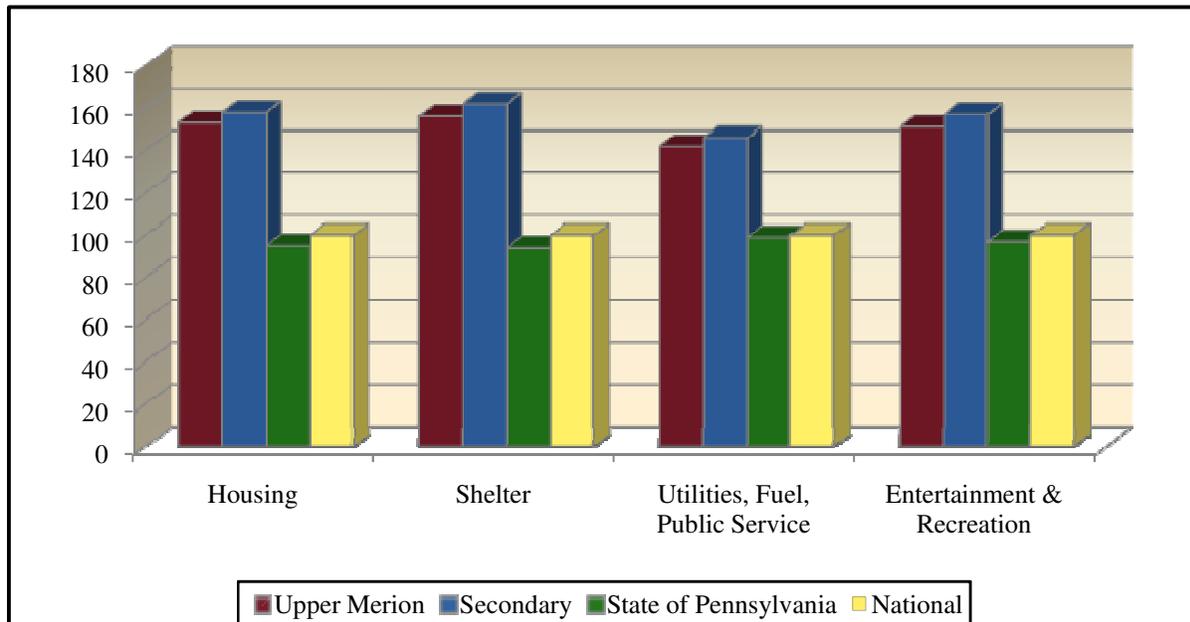
**Average Amount Spent:** The average amount spent per household.

**Percent:** Percent of the total 100% of household expenditures. **Note:** Shelter along with Utilities, Fuel, Public Service are a portion of the Housing percentage.

<sup>1</sup> Consumer Spending data are derived from the 2004 and 2005 Consumer Expenditure Surveys, Bureau of Labor Statistics. ESRI forecasts for 2008 and 2013.



**Chart I – Household Budget Expenditures Spending Potential Index**



Looking at the Median Household Income in the Township and Secondary Service Area, it is above the state and National level, and when examining the Household Budget Expenditures it would indicate that the cost of living in the service areas is higher than the State of Pennsylvania and the National Spending Potential Index (SPI) Number of 100. Additionally, it would appear that the Spending Potential Index (SPI) for Entertainment & Recreation in the Township and Secondary Service Area is higher than the State of Pennsylvania and the National Spending Potential Index of 100.

It will be important to keep this information in mind when developing a fee structure and looking at an appropriate cost recovery philosophy.



# MARKET ANALYSIS

## Upper Merion Community Center Study



**Table M – Service Area Comparison Chart:**

	Upper Merion Township	Secondary Service Area
<b>Population:</b>		
2000	26,863	72,939
2010	27,322	73,993
2015	27,390	74,090
<b>Households:</b>		
2000	11,575	28,950
2010	11,996	29,757
2015	12,067	29,895
<b>Families:</b>		
2000	7,137	18,341
2010	7,212	18,295
2015	7,195	18,198
<b>Average Household Size:</b>		
2000	2.30	2.38
2010	2.26	2.34
2015	2.25	2.33
<b>Ethnicity:</b>		
Hispanic	3.4%	4.3%
White	78.7%	80.5%
Black	6.1%	8.0%
American Indian	0.2%	0.2%
Asian	11.9%	8.0%
Pacific Islander	0.06%	0.05%
Other	1.1%	1.6%
Multiple	1.9%	1.6%
<b>Median Age:</b>		
2000	38.3	37.4
2010	41.0	40.0
2015	42.2	40.6
<b>Median Income:</b>		
2000	\$65,373	\$63,482
2010	\$84,336	\$82,315
2015	\$97,787	\$96,904
<b>Household Budget Expenditures:</b>		
Housing	31.4%	31.5%
Entertainment & Recreation	4.9%	5.0%



### **Recreation Activities Participation**

On an annual basis the National Sporting Goods Association (NSGA) conducts an in-depth study and survey of how Americans spend their leisure time. This information provides the data necessary to overlay rate of participation onto the primary service area to determine market potential.

**Comparison With National Statistics:** Utilizing information from the National Sporting Goods Association and comparing them with the demographics from Upper Merion Township, the following participation projections can be made (statistics were compared based on age, household income, regional population and national population).

**Table N – Participation Rates for Recreation Activities**

Activity	Age	Income	Region	Nation	Average
Aerobic	12.2%	15.2%	12.8%	12.3%	13.1%
Baseball	3.7%	5.7%	3.8%	4.3%	4.4%
Basketball	7.8%	11.4%	9.6%	9.0%	9.5%
Exercise w/ Equipment	21.1%	25.8%	20.3%	21.2%	22.1%
Exercise Walking	35.4%	40.5%	34.1%	34.6%	36.2%
Running/Jogging	10.9%	19.2%	11.6%	11.9%	13.4%
Skateboarding	2.5%	3.1%	2.3%	3.1%	2.7%
Soccer	4.3%	6.3%	6.2%	5.0%	5.4%
Softball	3.9%	5.7%	3.6%	4.4%	4.4%
Swimming	17.5%	21.5%	19.9%	18.6%	19.4%
Tennis	3.8%	4.7%	5.2%	4.0%	4.4%
Volleyball	3.4%	4.7%	4.9%	4.0%	4.3%
Weight Lifting	12.3%	17.3%	12.6%	12.8%	13.8%
Workout @ Clubs	14.1%	17.3%	13.4%	14.2%	14.7%

- Age (median):** Participation based on individuals ages 7 & Up of Upper Merion Township.
- Income:** Participation based on the 2010 estimated median household income in Upper Merion Township.
- Region:** Participation based on regional statistics (Middle Atlantic).
- National:** Participation based on national statistics.
- Average:** Average of the four columns.

**Anticipated Participation Numbers by Activity:** Utilizing the average percentage from Table-R above plus the 2000 census information and census estimates for 2010 and 2015 (over age 7) the following comparisons can be made.

**Table O – Participation Rates**

Activity	Average	2000 Part.	2010 Part.	2015 Part.	Difference
Aerobic	13.1%	3,258	3,316	3,329	72
Baseball	4.4%	1,088	1,107	1,112	24
Basketball	9.5%	2,346	2,388	2,398	52
Exercise w/ Equipment	22.1%	5,488	5,587	5,609	121
Exercise Walking	36.2%	8,976	9,138	9,174	198
Running/Jogging	13.4%	3,329	3,389	3,402	73
Skateboarding	2.7%	681	693	696	15
Soccer	5.4%	1,350	1,374	1,380	30
Softball	4.4%	1,095	1,114	1,119	24
Swimming	19.4%	4,810	4,896	4,916	106
Tennis	4.4%	1,098	1,118	1,123	24
Volleyball	4.3%	1,057	1,076	1,080	23
Weight Lifting	13.8%	3,414	3,475	3,489	75
Workout @ Clubs	14.7%	3,660	3,726	3,741	81
<b>TOTAL:</b>		<b>41,649</b>	<b>42,399</b>	<b>42,566</b>	<b>918</b>

**Note:** The estimated participation numbers indicated above are for each of the sports listed and do not necessarily translate into expected attendance figures at a community center since many participants utilize other facilities for these activities and may participate in more than one activity at a time. However, these figures do indicate the total number of people participating in various activities within the Township.

**Participation by Ethnicity and Race:** Participation in sports activities is also tracked by ethnicity and race. The table below compares the overall rate of participation nationally with the rate for Hispanics and African Americans. Utilizing information provided by the National Sporting Goods Association's 2009 survey, the following comparisons are possible.

**Table P – Comparison of National, African American and Hispanic Participation Rates**

	Upper Merion Township	National Participation	African American Participation	Hispanic Participation
Aerobic	13.1%	12.3%	12.2%	10.0%
Baseball	4.4%	4.3%	5.0%	5.4%
Basketball	9.5%	9.0%	15.4%	12.6%
Exercise w/ Equipment	22.1%	21.2%	19.7%	20.0%
Exercise Walking	36.2%	34.6%	30.1%	33.8%
Running/Jogging	13.4%	11.9%	10.7%	13.5%
Skateboarding	2.7%	3.1%	2.5%	4.5%
Soccer	5.4%	5.0%	2.1%	9.3%
Softball	4.4%	4.4%	4.3%	5.5%
Swimming	19.4%	18.6%	9.8%	18.1%
Tennis	4.4%	4.0%	2.8%	4.9%
Volleyball	4.3%	4.0%	1.9%	7.1%
Weight Lifting	13.8%	12.8%	10.9%	15.6%
Workout @ Clubs	14.7%	14.2%	1.0%	3.1%

**Primary Service Part:** The unique participation percentage developed for Upper Merion Township.

**National Rate:** The national percentage of individuals who participate in the given activity.

**African American Rate:** The percentage of African Americans who participate in the given activity.

**Hispanic Rate:** The percentage of Hispanics who participate in the given activity.

Based on the fact that there is not a significant Hispanic population in either service area those participation rates become irrelevant. However, given that there is a larger African American population in the service areas those numbers become more important as it relates to that ethnic population's participation in various activities.

# MARKET ANALYSIS

## Upper Merion Community Center Study



**Participation Correlation:** An additional piece of information to examine is participation correlation between various activities. This chart looks at activities commonly seen in recreation/wellness facilities and the participation correlation between those activities.

**Table Q – Participation Correlation**

	Aerobic	Basketball	Baseball	Exercise Walking	Exercise w/ Equipment	Running/Jogging	Swimming	Tennis	Volleyball	Weight Lifting
Aerobic		16.5 12.2	11.5 4.0	23.2 65.2	23.6 56.3	32.3 31.4	20.3 30.7	29.9 9.8	28.5 9.2	34.7 36.1
Basketball	12.2 16.5		51.0 24.1	10.0 38.1	14.2 33.2	8.3 23.2	10.1 44.2	12.7 11.9	12.6 11.7	6.7 20.1
Baseball	4.0 11.5	12.3 13.1		3.7 29.9	4.5 22.2	23.2 30.6	21.8 44.8	30.0 13.3	43.8 19.2	19.4 27.4
Exercise Walking	65.2 23.2	38.1 10.0	29.9 3.7		61.4 37.6	54.0 18.6	26.6 25.1	50.6 5.9	45.3 5.2	55.4 20.5
Exercise w/ Equipment	56.3 32.6	33.2 14.2	22.2 4.5	37.6 61.4		52.4 29.5	31.8 28.0	41.1 7.8	41.3 7.8	72.3 43.6
Running/Jogging	31.4 32.3	30.6 23.2	23.2 8.3	18.6 54.0	29.5 52.4		22.3 34.8	31.4 10.6	33.8 11.3	39.5 42.3
Swimming	30.7 20.3	44.8 21.8	44.2 10.1	25.1 46.6	28.0 31.8	34.8 22.3		49.6 10.7	50.9 10.9	28.3 19.5
Tennis	9.8 29.9	13.3 30.0	11.9 12.7	5.9 50.6	7.8 41.1	10.6 31.4	10.7 49.6		20.2 20.1	8.0 25.6
Volleyball	9.2 28.5	19.2 43.8	11.7 12.6	5.2 45.3	7.8 41.3	11.3 33.8	10.9 50.9	20.1 20.2		7.9 25.4
Weightlifting	1.3 14.8	6.1 50.5	5.3 20.7	1.3 42.1	1.9 37.1	42.3 39.5	19.5 28.3	25.6 8.0	25.4 7.9	

In interpreting this data the number at the top of each box refers to the percentage of the people that participate in the sport at the top of the page also participate in the sport to the left. **Example:** 19.5% of people that participate in Weightlifting also participate in Swimming. The number at the bottom of the box refers to the percentage of people that participate in the sport to the left also participate in the sport at the top of the page. **Example:** 28.3% of people that Swim also participate in Weightlifting.



**Summary of Sports Participation:** The following chart summarizes participation in various sports and leisure activities utilizing information from the 2009 National Sporting Goods Association survey.

**Table R – Sports Participation Summary**

Sport	Nat'l Rank <sup>2</sup>	Nat'l Participation (in millions)	Upper Merion Township	Primary Service % Participation
Exercise Walking	1	93.4	1	36.2%
Exercising w/ Equipment	2	57.2	2	22.1%
Swimming	5	50.2	3	19.4%
Work-Out at Club	7	38.3	4	14.7%
Weightlifting	9	34.5	5	13.8%
Aerobic Exercising	11	33.1	7	13.1%
Running/Jogging	12	32.2	6	13.4%
Basketball	15	24.4	8	9.5%
Soccer	21	13.6	10	5.4%
Softball	27	11.8	11	4.4%
Baseball	28	11.5	11	4.4%
Tennis	29	10.8	11	4.4%
Volleyball	30	10.7	14	4.3%
Skateboarding	33	8.4	15	2.7%

**Nat'l Rank:** Popularity of sport based on national survey.

**Nat'l Participation:** Percent of population that participate in this sport on national survey.

**Primary Service %:** Ranking of activities based upon average from Table-N.

**Primary Service Rank:** The rank of the activity within Upper Merion Township.

<sup>2</sup> This rank is based upon the 52 activities reported on by NSGA in their 2009 survey instrument.



**Comparison of State Statistics with National Statistics:** Utilizing information from the National Sporting Goods Association, the following charts illustrate the participation numbers in selected sports in the State of Pennsylvania.

**State of Pennsylvania participation numbers in selected indoor and outdoor sports** - As reported by the National Sporting Goods Association in 2009.

**Table S – Pennsylvania Participation Rates**

Sport	Pennsylvania Participation (in thousands)	Age Group	Largest Number
Exercise Walking	2,701	35-44	35-44
Exercising w/ Equipment	2,112	25-34	25-34
Swimming	1,713	7-11	35-44
Work-Out at Club	1,186	25-34	25-34
Weightlifting	824	12-17	25-34
Aerobic Exercising	833	25-34	25-34
Running/Jogging	931	25-34	25-34
Basketball	1,344	12-17	12-17
Soccer	498	7-11	7-11
Softball	512	7-11	25-34
Baseball	498	7-11	7-11
Tennis	255	7-11	35-44
Volleyball	613	12-17	12-17
Skateboarding	313	7-11	12-17

**PA Participation:** The number of people (in thousands) in Pennsylvania who participated more than once in the activity in 2009 and are at least 7 years of age.

**Age Group:** The age group in which the sport is most popular or in other words, where the highest percentage of the age group participates in the activity. (Example: The highest percent of an age group that participates in exercise walking is 55-64.) **This is a national statistic.**

**Largest Number:** The age group with the highest number of participants. Example: The greatest number of exercise walkers is in the 45-54 age group. (Note: This statistic is driven more by the sheer number of people in the age group than by the popularity of the sport in the age span.) **This is a national statistic.**

**Pennsylvania sport percentage of participation compared with the population percentage of the United States:**

Pennsylvania’s population represents 4.0% of the population of the United States (based on 2010 estimates from ESRI).

**Table T – Pennsylvania Participation Correlation**

Sport	Participation Percentages
Volleyball	5.7%
Basketball	5.5%
Softball	4.3%
Baseball	4.3%
Swimming	3.7%
Soccer	3.7%
Skateboarding	3.7%
Exercising w/ Equipment	3.4%
Work-Out at Club	3.1%
Exercise Walking	2.9%
Running/Jogging	2.9%
Aerobic Exercising	2.5%
Weightlifting	2.4%
Tennis	2.4%

**Note:** Sports participation percentages refer to the total percent of the national population that participates in a sport that comes from the State of Pennsylvania’s population. The fact that the rate of participation is greater in only four activities indicates a possible lower rate of participation in these activities.



**Recreation Expenditures Spending Potential Index:** In addition to participation in recreation activities ESRI also measures recreation expenditures in a number of different areas and then indexes this against national numbers. The following comparisons are possible.

**Table U – Recreation Expenditures Spending Potential Index**

Upper Merion Township	SPI	Average Spent
Fees for Participant Sports	156	\$166.32
Fees for Recreational Lessons	166	\$226.21
Social, Recreation, Club Membership	165	\$269.54
Exercise Equipment/Game Tables	124	\$101.46
Other Sports Equipment	144	\$13.64

Secondary Service Area	SPI	Average Spent
Fees for Participant Sports	164	\$174.45
Fees for Recreational Lessons	175	\$238.55
Social, Recreation, Club Membership	172	\$282.59
Exercise Equipment/Game Tables	127	\$104.18
Other Sports Equipment	150	\$14.16

State of Pennsylvania	SPI	Average Spent
Fees for Participant Sports	94	\$99.90
Fees for Recreational Lessons	94	\$128.00
Social, Recreation, Club Membership	96	\$157.48
Exercise Equipment/Game Tables	79	\$65.08
Other Sports Equipment	98	\$9.26

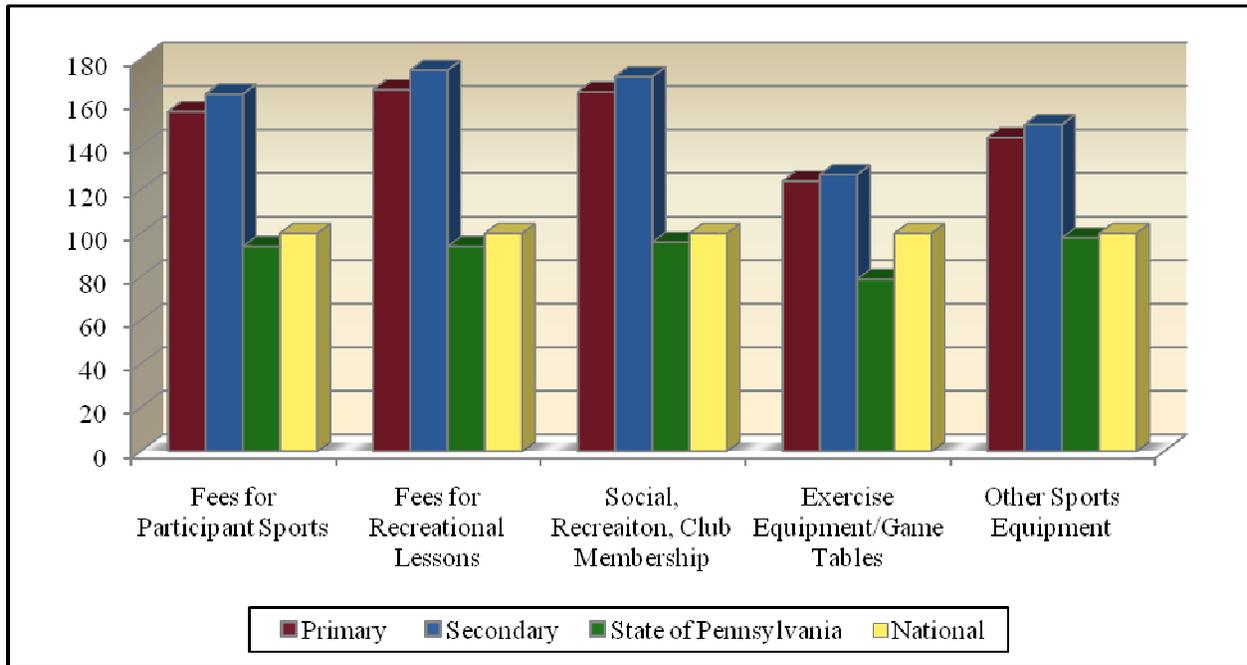
**Average Amount Spent:** The average amount spent for the service or item in a year.

**SPI:** Spending potential index as compared to the national number of 100.





**Chart J – Recreation Spending Potential Index**

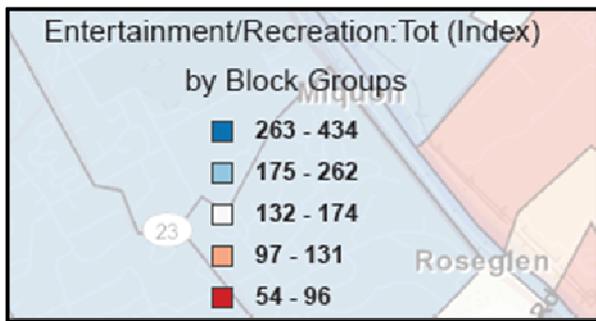
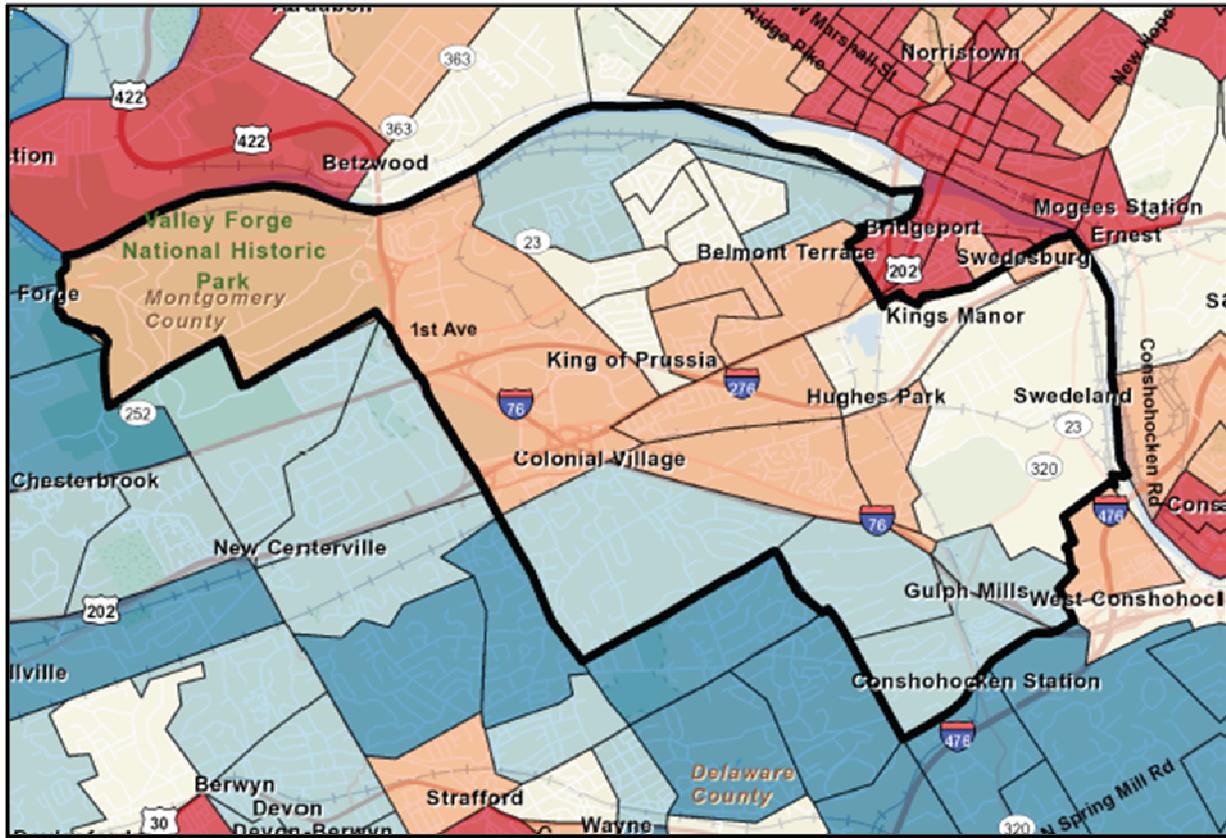


The SPI index indicates that in all areas the rate of spending is significantly higher than the state average and the National Spending Potential Index (SPI) of 100. This information is very important when determining a price point for activities and cost recovery philosophy.

It is also important to note that these dollars are currently being spent, so the identification of alternative service providers and the ability of another facility to capture a portion of these dollars will be important.



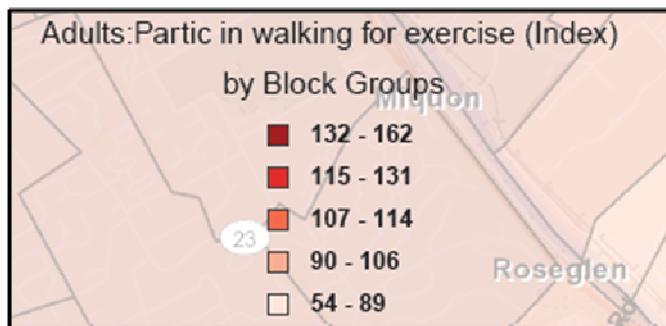
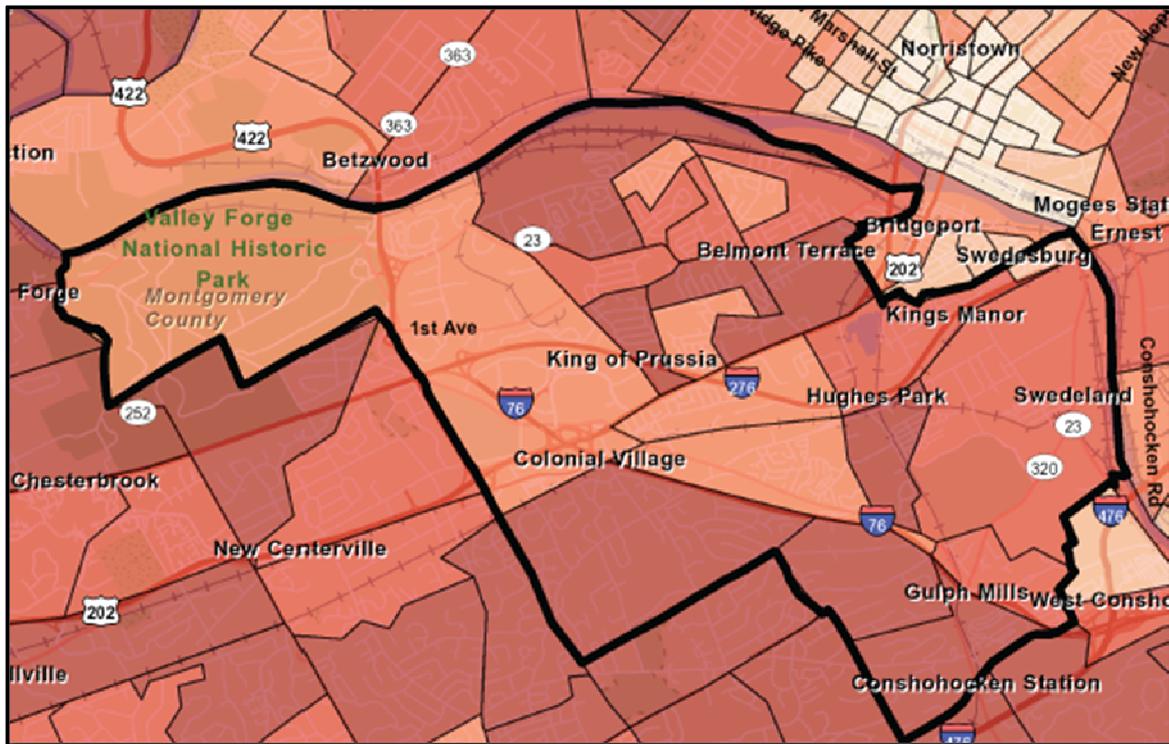
**Map E - Entertainment/Recreation Total Dollars Spent by Census Block Group**



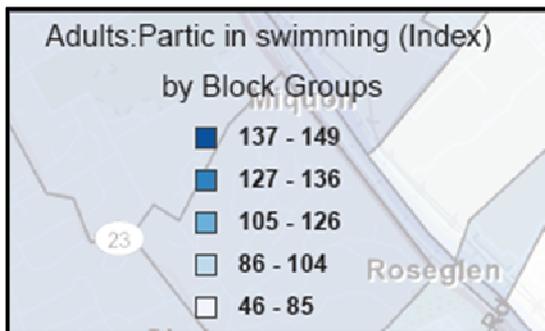
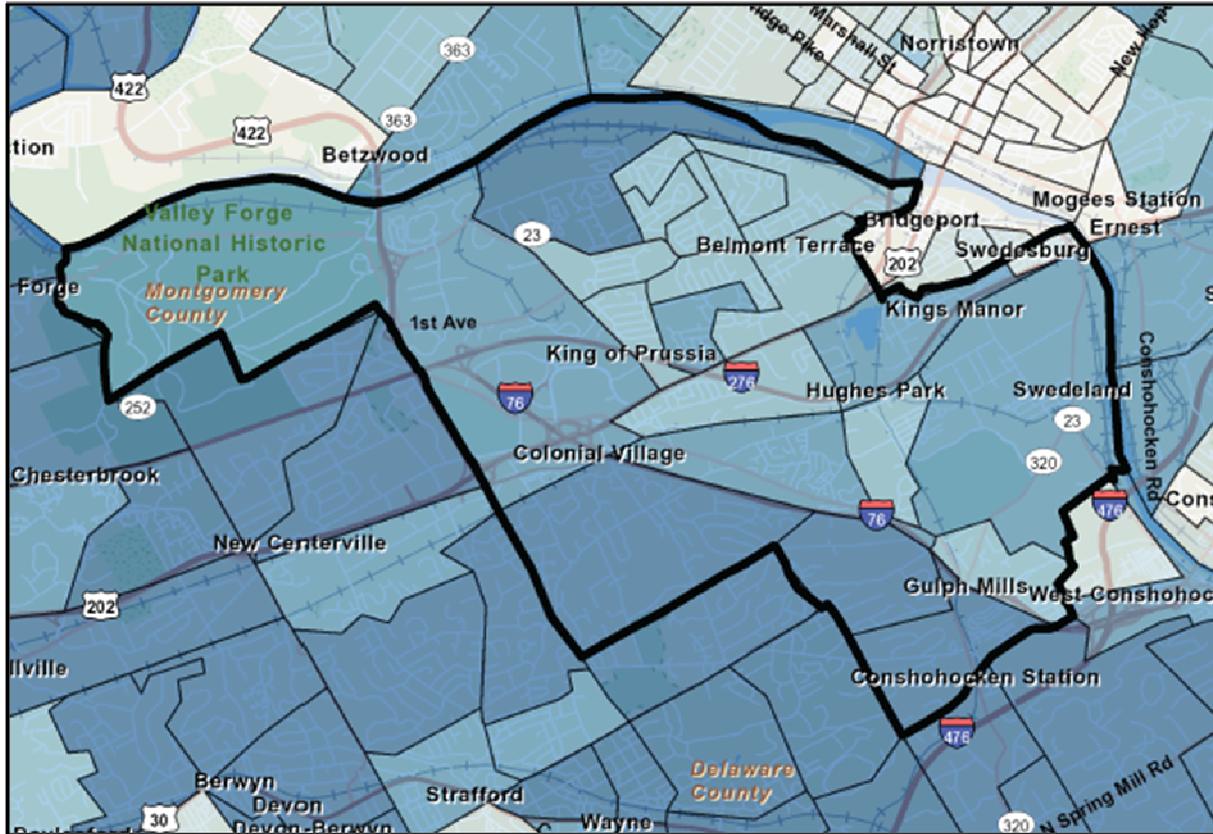
### Mapping of Recreation Activities

In addition to looking at Recreation and Entertainment Spending Potential Index, it is possible to evaluate adult participation in various activities by census block groups. The following maps illustrate this information and it is significant in that the bulk of the indexes in block groups within the market area are greater than 100. The index of 100 is the National average, which would indicate participation in the various recreation activities is strong.

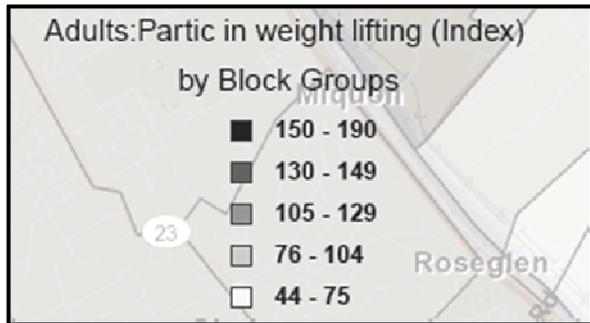
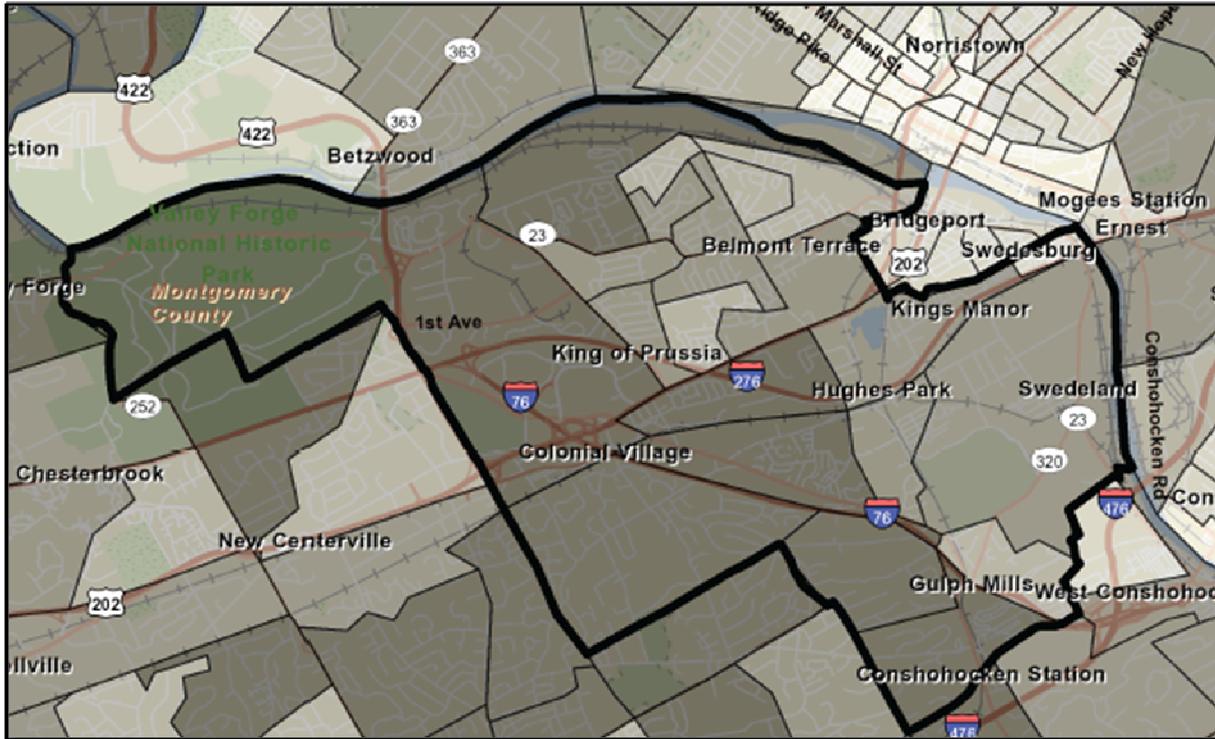
### Map F – Adults: Participation in Exercise Walking (Index) by Census Block Groups:



**Map G – Adults: Participation in Swimming (Index) by Census Block Groups:**



**Map H – Adults: Participation in Weight Lifting (Index) by Census Block Groups:**



**Non-Sport Participation Statistics:** It is recognized that most community centers are more than just sports oriented facilities. Participation in a wide variety of passive activities and cultural pursuits is common and essential to a well-rounded center. This information is useful in determining some of the program participation and revenue in the operations section of the report.

While there is not an abundance of information available for participation in these types of activities as compared to sport activities, there are statistics that can be utilized to help determine the market for cultural arts activities and events.

There are many ways to measure a nation's cultural vitality. One way is to chart the public's involvement with arts events and other activities over time. The NEA's Survey of Public Participation in the Arts remains the largest periodic study of arts participation in the United States, and it is conducted in partnership with the U.S. Census Bureau. The large number of survey respondents – similar in make-up to the total U.S. adult population – permits a statistical snapshot of American's engagement with the arts by frequency and activity type. The survey has taken place five times since 1982, allowing researchers to compare the trends not only for the total adult population, but also for demographic subgroups.<sup>3</sup>

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<sup>3</sup> National Endowment for the Arts, *Arts Participation 2008 Highlights from a National Survey*.

**Table V – Percentage of U.S. Adult Population Attending Arts Performances: 1982-2008**

					Rate of Change	
	1982	1992	2002	2008	2002-2008	1982-2008
Jazz	9.6%	10.6%	10.8%	7.8%	-28%	-19%
Classical Music	13.0%	12.5%	11.6%	9.3%	-20%	-29%
Opera	3.0%	3.3%	3.2%	2.1%	-34%	-30%
Musical Plays	18.6%	17.4%	17.1%	16.7%	-2%	-10%
Non-Musical Plays	11.9%	13.5%	12.3%	9.4%	-24%	-21%
Ballet	4.2%	4.7%	3.9%	2.9%	-26%	-31%

Smaller percentages of adults attended performing arts events than in previous years.

- Opera and jazz participation significantly decreased for the first time, with attendance rates falling below what they were in 1982.
- Classical music attendance continued to decline – at a 29% rate since 1982 – with the steepest drop occurring from 2002 to 2008
- Only musical play saw no statistically significant change in attendance since 200.

**Table W – Percentage of U.S. Adult Population Attending Art Museums, Parks and Festivals: 1982-2008**

					Rate of Change	
	1982	1992	2002	2008	2002-2008	1982-2008
Art Museums/Galleries	22.1%	26.7%	26.5%	22.7%	-14%	+3%
Parks/Historical Buildings	37.0%	34.5%	31.6%	24.9%	-21%	-33%
Craft/Visual Arts Festivals	39.0%	40.7%	33.4%	24.5%	-27%	-37%

Attendance for the most popular types of arts events – such as museums and craft fairs – also declined.

- After topping 26% in 1992 and 2002, the art museum attendance rate slipped to 23 percent in 2008 – comparable to the 1982 level.
- The proportion of the U.S. adults touring parks or historical buildings has diminished by one-third since 1982.



**Table X – Median Age of Arts Attendees: 1982-2008**

					<b>Rate of Change</b>	
	<b>1982</b>	<b>1992</b>	<b>2002</b>	<b>2008</b>	<b>2002-2008</b>	<b>1982-2008</b>
U.S. Adults, Average	39	41	43	45	+2	+6
Jazz	29	37	43	46	+4	+17
Classical Music	40	44	47	49	+2	+9
Opera	43	44	47	48	+1	+5
Musicals	39	42	44	45	+1	+6
Non-Musical Plays	39	42	44	47	+3	+8
Ballet	37	40	44	46	+2	+9
Art Museums	36	39	44	43	-1	+7

Long-term trends suggest fundamental shifts in the relationship between age and arts attendance.

- Performing arts attendees are increasingly older than the average U.S. adult.
- Jazz concert-goers are no longer the youngest group of arts participants.
- Since 1982, young adult (18-24 year old) attendance rates have declined significantly for jazz, classical music, ballet, and non-musical plays.
- From 2002 to 2008, however, 45-54 year olds – historically a large component of arts audiences – showed the steepest declines in attendance for most arts events.



**Table Y – Percentage of U.S. Adult Population Performing or Creating Art: 1992-2008**

	1992	2002	2008	Rate of Change	
				2002-2008	1982-2008
<b>Performing:</b>					
Jazz	1.7%	1.3%	1.3%	+0.0%	-0.4%
Classical Music	4.2%	1.8%	3.0%	+1.2%	-1.2%
Opera	1.1%	0.7%	0.4%	-0.3%	-0.7%
Choir/Chorus	6.3%	4.8%	5.2%	+0.4%	-1.1%
Musical Plays	3.8%	2.4%	0.9%	-1.5%	-2.9%
Non-Musical Plays	1.6%	1.4%	0.8%	-0.6%	-0.8%
Dance	8.1%	4.3%	2.1%	-2.2%	-6.0%
<b>Making:</b>					
Painting/Drawing	9.6%	8.6%	9.0%	+0.4%	-0.6%
Pottery/Ceramics	8.4%	6.9%	6.0%	-0.9%	-2.4%
Weaving/Sewing	24.8%	16.0%	13.1%	-2.9%	-11.7%
Photography	11.6%	11.5%	14.7%	+3.2%	+3.1%
Creative Writing	7.4%	7.0%	6.9%	-0.1%	-0.5%

Adults generally are creating or performing at lower rates – despite opportunities for displaying their work line.

- Only photography increased from 1992 to 2008 – reflecting, perhaps, greater access through digital media.
- The proportion of U.S. adults doing creative writing has hovered around 7.0 percent.
- The rate of classical music performance slipped from 1992 to 2002 then grew over the next six years.
- The adult participation rate for weaving or sewing was almost twice as great in 1992 as in 2008. Yet this activity remains one of the most popular forms of art creation.



**Table Z – Percentage of U.S. Adult Population Viewing or Listening to Art Broadcasts or Recordings, 2008 (online media included)**

	Percentage	Millions of Adults
Jazz	14.2%	31.9
Classical Music	17.8%	40.0
Latin or Salsa Music	14.9%	33.5
Opera	4.9%	11.0
Musical Plays	7.9%	17.8
Non-Musical Plays	6.8%	15.3
Dance	8.0%	18.0
Programs about the visual arts	15.0%	33.7
Programs about books/writers	15.0%	33.7

As in previous years, more Americans view or listen to broadcasts and recordings of arts events than attend them live.

- The sole exception is live theater, which still attracts more adults than broadcasts or recordings of plays or musicals (online media included).
- Classical music broadcasts or recordings attract the greatest number of adult listeners, followed by Latin or salsa music.
- 33.7 million Americans listened to or watched programs or recordings about books.



# MARKET ANALYSIS

## *Upper Merion Community Center Study*

Below are listed those sports activities that would often take place either in a community center, or in close proximity to, and the percentage of growth or decline that each has experienced nationally over the last 10 years (2000-2009).

**Table AA – National Activity Trend (in millions)**

Sport/Activity	2000 Participation	2009 Participation	Percent Change
Hockey (Ice)	1.9	3.1	63.2%
Weightlifting	22.8	34.5	51.3%
Running/Jogging	22.8	32.2	41.2%
Exercise w/ Equipment	44.8	57.2	27.7%
Aerobic Exercising	26.7	33.1	24.0%
Exercise Walking	81.3	93.4	14.9%
Work-Out at Club	34.1	38.3	12.3%
Tennis	10.0	10.8	8.0%
Soccer	12.9	13.6	5.4%
Skateboarding	9.1	8.4	-7.7%
Basketball	27.1	24.4	-10.0%
Volleyball	12.3	10.7	-13.0%
Swimming	58.8	50.2	-14.6%
Softball	14.0	11.8	-15.7%
Baseball	15.6	11.5	-26.3%

**1998 Participation:** The number of participants per year in the activity (in millions) in the United States.

**2008 Participation:** The number of participants per year in the activity (in millions) in the United States.

**Percent Change:** The percent change in the level of participation from 2000 to 2009.



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Due to the increasing recreational demands there has been a shortage in most communities of the following spaces.

- Gymnasiums
- Pools (especially leisure pools)
- Weight/cardiovascular equipment areas
- Indoor running/walking tracks
- Meeting/multipurpose (general program) space
- Senior's program space
- Pre-school and youth space
- Teen use areas

As a result, many communities have attempted to include these amenities in public community centers. With the growth in youth sports and the high demand for school gyms, most communities are experiencing an acute lack of gymnasium space. Weight/cardiovascular space is also in high demand and provides a facility with the potential to generate significant revenues.

The success of most indoor community recreation facilities is dependent on meeting the recreational needs of a variety of individuals. The fastest growing segment of society is the senior population and meeting the needs of this group is especially important now and will only grow more so in the coming years. Indoor walking tracks, exercise areas, pools and classroom spaces are important to this age group. Marketing to the younger more active senior is paramount, as this age group has the free time available to participate in leisure activities, the desire to remain fit, and more importantly the disposable income to pay for such services.

Youth programming has always been a cornerstone for recreation services and will continue to be so with an increased emphasis on teen needs and providing a deterrent to juvenile crime.

As more and more communities attempt to develop community recreation facilities the issues of competition with other providers in the market area have inevitably been raised. The loudest objections have come from the private health club market and their industry voice IHRSA. The private sector has vigorously contended that public facilities unfairly compete with them in the market and have spent considerable resources attempting to derail public projects. However, the reality is that in most markets where public community recreation centers have been built, the private sector has not been adversely affected and in fact in many cases has continued to grow. This is due in large part to the fact that public and private providers serve markedly different markets. One of the other issues of competition comes from the non-profit sector (primarily YMCA's but also JCC's, and others), where the market is much closer to that of the public providers. While not as vociferous as the private providers, the non-profits have also often expressed concern over public community centers. What has resulted from this is a strong



growth in the number of partnerships that have occurred between the public and non-profit sector in an attempt to bring the best recreation amenities to a community.

**Aquatic Activity and Facility Trends:** Without a doubt the hottest trend in aquatics is the leisure pool concept. This idea of incorporating slides, current channels, fountains, zero depth entry and other water features into a pool's design has proved to be extremely popular for the recreational user. The age of the conventional pool in most recreational settings has been greatly diminished. Leisure pools appeal to the younger children (who are the largest segment of the population that swim) and to families. These types of facilities are able to attract and draw larger crowds and people tend to come from a further distance and stay longer to utilize such pools. This all translates into the potential to sell more admissions and increase revenues. It is estimated conservatively that a leisure pool can generate up to 20% to 25% more revenue than a comparable conventional pool and the cost of operation, while being higher, has been offset through increased revenues. Of note is the fact that patrons seem willing to pay a higher user fee at a leisure pool than a conventional aquatics facility.

Another trend that is growing more popular in the aquatic's field is the development of a raised temperature therapy pool for rehabilitation programs. This has usually been done in association with a local health care organization or a physical therapy clinic. The medical organization either provides capital dollars for the construction of the pool or agrees to purchase so many hours of pool time on an annual basis. This form of partnership has proven to be appealing to both the medical side and the organization that operates the facility. The medical sector receives the benefit of a larger aquatic center, plus other amenities that are available for their use, without the capital cost of building the structure. In addition, they are able to develop a much stronger community presence away from traditional medical settings. The facility operators have a stronger marketing position through an association with a medical organization and a user group that will provide a solid and consistent revenue stream for the center. This is enhanced by the fact that most therapy use times occur during the slower mid-morning or afternoon times in the pool and the center.

Despite the recent emphasis on recreational swimming and therapy, the more traditional aspects of aquatics (including swim teams, instruction and aqua fitness) remain as the foundation for many aquatic centers. The life safety issues associated with teaching children how to swim is a critical concern in most communities and competitive swim team programs through USA Swimming, high schools, and other community based organizations continue to be important. Aqua fitness, from aqua exercise to lap swimming, has enjoyed strong growth during the last ten years with the realization of the benefits of water-based exercise.



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**Community Center Benchmarks:** Based on market research conducted by Ballard\*King & Associates at community centers across the United States, the following represents the basic benchmarks.

- The majority of community centers that are being built today are between 65,000 and 75,000 square feet. Most centers include three primary components A) A pool area usually with competitive and leisure amenities, B) Multipurpose gymnasium space, and C) Weight/cardiovascular equipment area. In addition, most centers also have group exercise rooms, drop-in childcare, and classroom and/or community spaces.
- For most centers to have an opportunity to cover all of their operating expenses with revenues, they must have a service population of at least 50,000 and an aggressive fee structure.
- Most centers that are between 65,000 and 75,000 square feet have an operating budget of between \$2,000,000 and \$2,500,000 annually. Nearly 65% of the operating costs are from personnel services, followed by approximately 25% for contractual services, 8% for commodities, and 2% for capital replacement.
- For centers that serve a more urban population and have a market driven fee structure, they should be able to recover 70% to 100% of operating expenses. For centers in more rural areas the recovery rate is generally 50% to 75%. Facilities that can consistently cover all of their operating expenses with revenues are rare. The first true benchmark year of operation does not occur until the third full year of operation.
- The majority of centers of the size noted (and in an urban environment) above average daily paid attendance of 800 to as much as 1,000 per day. These centers will also typically sell between 1,500 and 2,500 annual passes (depending on the fee structure and marketing program).
- It is common for most centers to have a three-tiered fee structure that offers daily, extended visit (usually punch cards) passes, and annual passes. In urban areas it is common to have resident and non-resident fees. Non-resident rates can cost 25% to 50% higher than the resident rate and are usually a topic of discussion amongst elected officials. Daily rates for residents average between \$3.00 and \$6.00 for adults, \$3.00 and \$4.00 for youth and the same for seniors. Annual rates for residents average between \$250 and \$350 for adults, and \$150 and \$250 for youth and seniors. Family annual passes tend to be heavily discounted and run between \$550 and \$1,000.



- Most centers are open an average of 109 hours a week, with weekday hours being 5:00 am to 10:00 pm, Saturdays and Sundays from 8:00 am to 8:00 pm. Often hours are shorter during the summer months.

Note: These statistics vary by regions of the country.

**Market Orientation:** Based on the demographic makeup of the service areas and the trends in indoor recreation amenities, there are specific market areas that need to be addressed with such community facilities. These include:

**General:**

**1. Drop-in recreation activities** - Critical to the basic operation of any community center is the availability of the facility for drop-in use by the general public. This requires components that support drop-in use and the careful scheduling of programs and activities to ensure that they do not dominate the center and exclude the drop-in user. The sale of annual passes and daily admissions, potential strong revenue sources for a center, requires a priority for drop-in use.

**2. Instructional programming** - The other major component of a community center's operation is a full slate of programs in a variety of disciplines. The center should provide instruction for a broad based group of users in a number of program areas. The primary emphasis should be on teaching basic skills with a secondary concern for specialized or advanced instruction.

**3. Special events** - There should be a market for special events including kid's birthday parties, community organization functions, sports tournaments and other special activities. The development of this market will aid significantly in the generation of additional revenues and these events can often be planned for before or after regular operating hours or during slow use times of the year. Care should be taken to ensure that special events do not adversely impact the everyday operations of the center.

**4. Community rentals** - Another aspect of a center's operation is providing space for rentals by civic groups or organizations as well as the general public. Gyms and multi-purpose rooms can be used as a large community gathering space and can host a variety of events from seminars, parties, receptions, arts and crafts sales and other events. It is important that a well-defined rental fee package is developed and the fee schedule followed closely. Rentals should not be done at the expense of drop-in use or programming in the center.

**5. Social welfare programs** – An emerging area for many centers is the use of space for social service activities and programs. Special population activities, teen assistance programs, childcare and other similar uses are now common in many facilities.



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**Specific market segments include:**

**1. Families** - Within most markets an orientation towards family activities is essential. The ability to have family members of different ages participate in a variety of activities together or individually is the challenge.

**2. Pre-school children** - The needs of pre-school age children need to be met with a variety of activities and programs designed for their use. From drop-in childcare to specialized pre-school classes, a number of such programs can be developed. Interactive programming involving parents and toddlers can also be beneficial. It is significant that this market usually is active during the mid morning time frame, providing an important clientele to the facility during an otherwise slow period of the day. For parents with small children who wish to participate in their own activities, babysitting services are often necessary during the morning and early evening time slots.

**3. School age youth** - Recreation programming has tended to concentrate on this market segment and this age group should be emphasized at a center as well. This group requires a wide variety of programs and activities that are available after school or during weekend hours. Instructional programs and competitive sports programs are especially popular, as well as drop-in use of the facility.

**4. Teens** - A major focus of many community center projects is on meeting the needs of teenagers in the community. There is a great debate among recreation providers throughout the country on how to best provide recreation programming for this age group. Some believe that dedicated teen space is required to meet their needs while others find that it is the activities and approach that is more important. Serving the needs of this age group will often require the use of many areas of the center at certain “teen” times of use.

**5. Seniors** - As the population of the United States and the service areas continue to age, continuing to meet the needs of an older senior population will be essential. As has been noted, a more active and physically oriented senior is now demanding services to ensure their continued health. Aqua exercise, lap swimming, weight training and cardiovascular conditioning have proven to be popular with this age group. Again, the fact that this market segment will usually utilize a facility during the slower use times of early to mid-day also is appealing. Providing services for this age group should be more of a function of time than space.

**6. Business/corporate** - This market has a variety of needs from fitness/wellness and instruction, to recreation and social. The more amenities and services that can be offered at one location the more appeal there is to this market segment. The business community should be surveyed to determine their specific needs and expectations.





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**7. Special needs population** - This is a secondary market, but with the A.D.A. requirements and the existence of a number of recreation components, the amenities will be present to develop programs for this population segment. Association with health care providers and/or other social service agencies will be necessary to fully reach this market.

**8. Visitor/tourist** - This market can be developed through working with local hotels/motels, convention/visitor authorities in the area. Generally the leisure pool and fitness elements of the facility have the most appeal for this group. This involves the development of a specific marketing plan more than anything else. Site will also have a strong bearing on use by visitors and tourists.

**9. Special interest groups** - This is a market that needs to be explored to determine the use potential from a variety of groups. These could include school functions, social service organizations and adult and youth sports teams. While the needs of these groups can be great, their demands on a center can often be incompatible with the overall mission of the facility. Care must be taken to ensure that special interest groups are not allowed to dictate use patterns for the center.





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**Service Area Providers:** There are a significant number of facilities in the greater Upper Merion area that are supplying recreation, fitness, aquatics and sports activities. The following is a brief review of each of the major providers in the public, non-profit and private sector.

***Public Facilities***

There are a variety of public indoor recreation amenities in the area. These include:

*Upper Merion Township*

The Township has a number of small recreation facilities.

Gulph Gymnasium – Located at the old Gulph School, the gym is controlled by the Township and utilized for a variety of recreation programs.

Belmont Classroom – One of the classrooms in the old Belmont School is controlled by the Township and is also home to a number of recreation programs.

Heuser Clubhouse – Located in Heuser Park, this small building is part of the athletic field complex and houses restrooms, an office and a large, open, multipurpose room.

Township Building – Some of the meeting rooms in the building are utilized for more passive types of recreation. In addition the library provides some additional spaces.

Gulph Gymnasium



Belmont Classroom



*Upper Merion School District* – With limited indoor recreation space under their control, the Township is highly reliant on the schools to support their recreation programs. The school facilities that are used for community recreation purposes include:



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Roberts Elementary – gym, cafeteria, classrooms, and library.

Bridgeport Elementary - gym, and classrooms.

Caley Elementary - gym, and classrooms.

Candlebrook Elementary - gym, cafeteria, classrooms, and library.

Upper Merion Middle School - gym, cafeteria, classrooms, pool and auditorium.

Upper Merion High School - gym, classrooms, and pool.

Upper Merion Middle School Pool



Upper Merion High School Pool



*Greater Plymouth Community Center* – This Plymouth Township facility is the closest full-service indoor recreation facility to Upper Merion but it is still well outside the service area for the community.

Beyond the Greater Plymouth Community Center, none of the communities in the immediate area have any significant indoor recreation facilities leaving a large market opportunity.

It is significant that the school district has two indoor pools. They are both conventional pools that are designed for classes and programs as well as competitive swimming.





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***Non-Profit Facilities***

There are a limited number of non-profit facilities in the greater Upper Merion area. These include:

*YMCA's* – there are a number of Y's in area. The two that are in closest proximity are:

Audubon YMCA – Located in West Norriton this full service Y is in relatively close proximity to Upper Merion.

Upper Main Line YMCA – This Y is located to the south and west of Upper Merion, and is also a full-service facility.

Other YMCA's that are further away include:

- Spring Valley YMCA
- Phoenixville YMCA
- Mainline YMCA
- Roxborough YMCA

*Church's* – a number of churches in the area have limited recreation facilities (gyms, halls, auditoriums, meeting rooms, etc.)

- Hope Church
- Valley Forge Presbyterian Church
- Good Shepherd Lutheran Church

*Upper Merion Senior Service Center* – Located in the old Gulph School, this non-profit senior center is partially supported by the Township. It has a variety of meeting and classroom space including a small library, crafts room, and computer room.

Upper Merion Senior Service Center





The YMCA has a major presence in the area and is a primary provider of more family based recreation activities. The churches in the area also have a number of amenities that can be utilized for recreation.

### *Private Facilities*

Besides the public and non-profit facilities noted above there are several private facilities in the area. This includes the following:

### *Health Clubs*

The Factory Sports & Fitness – This club is located at one of the possible sites for a Township Community Center. The facility has a large weight/cardio equipment area, indoor soccer space and small gym.

Fairmount Athletic Club – The club has a heavy emphasis on squash with 10 courts but it also has a large weight/cardio equipment area, spinning studio, 2 group exercise studios and other amenities.

Bally Total Fitness – Located next to the King of Prussia Mall, this is an older traditional health club with a heavy emphasis on fitness.

The Sweat – This is a smaller fitness center located in the Township

LA Fitness – This new full-service health club is located in Norristown.

Curves – This women’s only facility has a large number of locations in the area.

The Factory Sports & Fitness



Bally Total Fitness





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### *Outdoor Swim Clubs*

Markley Farms Swim Club – This is an outdoor swim club with a large pool and slide. The club also has tennis courts. This club is likely not to open next summer due to poor financial conditions.

Picket Post Swim & Tennis Club – The club has a conventional outdoor pool and outdoor tennis courts.

Plymouth Swim Club – This is an older swim club with a relatively small outdoor pool.

Martin’s Dam Swim Club – This swim club is located in Upper Merion Township, this is a high end facility that has a long waiting list for membership.

### *Specialty*

Competitive Edge Sports – This facility has 5 indoor basketball/volleyball courts and a snack bar. They run a variety of leagues, camps and tournaments.

Gulph Mills Tennis Center (Julian Krinsky Tennis) – The center has 10 indoor tennis courts.

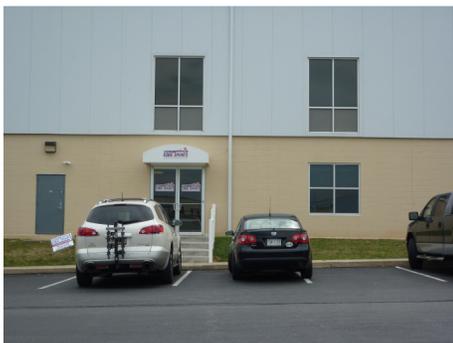
The Far Post – This is an indoor soccer/lacrosse facility that may no longer be in business.

YSC Sports – This is an indoor soccer facility that also has some outdoor fields.

Aspiring Champions – This is a sports specific training facility that has an indoor turf area, basketball/volleyball courts, track and fitness areas.

Upper Merion Dance & Gymnastics – The focus of the facility is on dance and gymnastics training.

Competitive Edge Sports



YSC Sports





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In addition to these facilities, there are also a number of smaller fitness facilities, dance, martial arts and yoga studios. Many of the hotels and motels in the area also have indoor pools and even small fitness areas but these are generally only open to hotel guests.

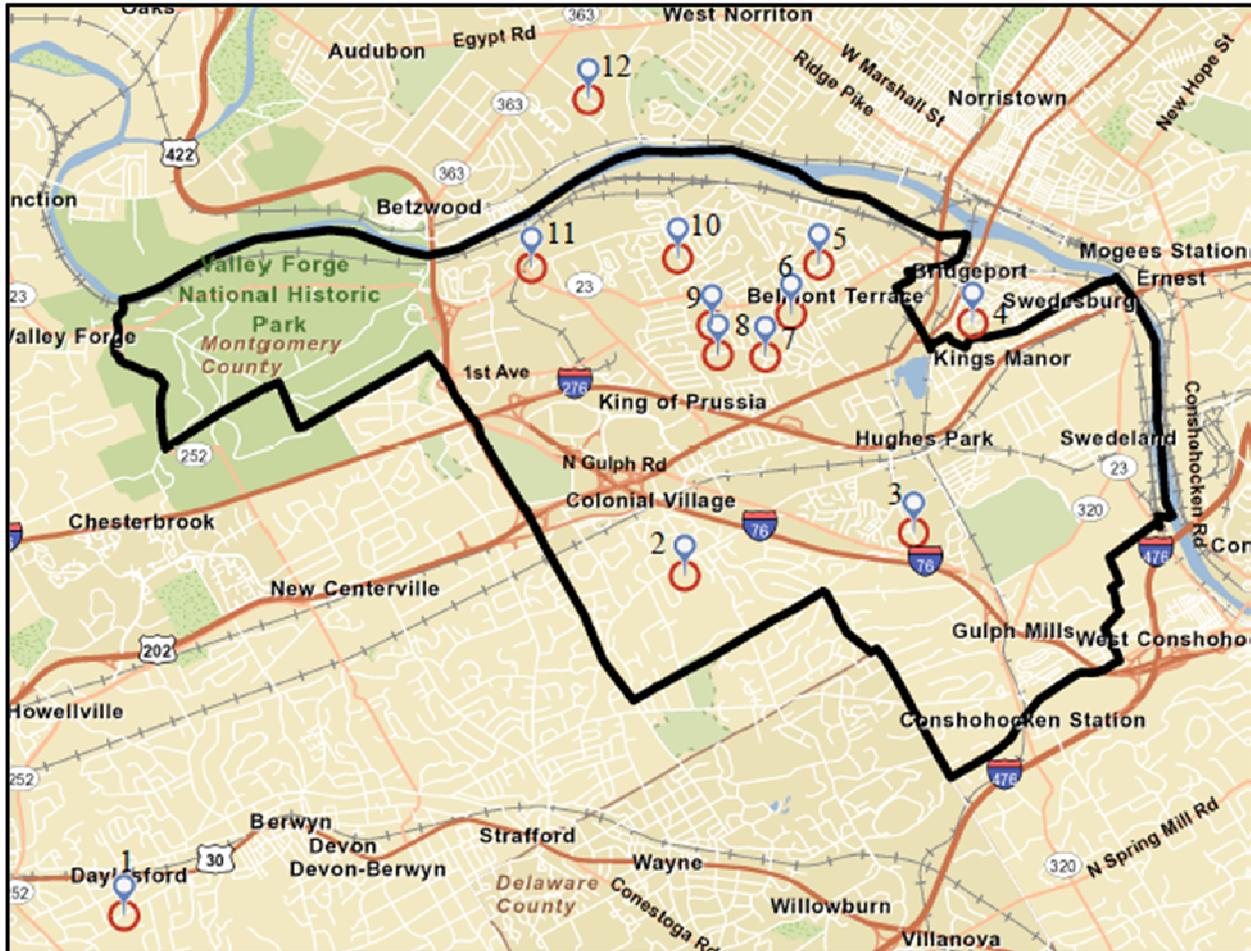
It is likely that some of these existing private providers may have a concern over the possibility that a new public community center (if it contains fitness amenities) would adversely impact their market and they may very well oppose the project as a result. However, private fitness clubs typically serve very different clientele and usually do not compete head to head for the same users. It is conservatively estimated that well over 50% of the users of a public facility will have never been to a private facility and would have no interest in joining such a center.

This is a representative listing of alternative recreation, fitness and sports facilities in the greater Upper Merion area and is not meant to be a total accounting of all service providers. There may be other facilities located in the greater service area that have an impact on the market as well.





### Map I - Alternative Service Providers – Public & Non-Profit

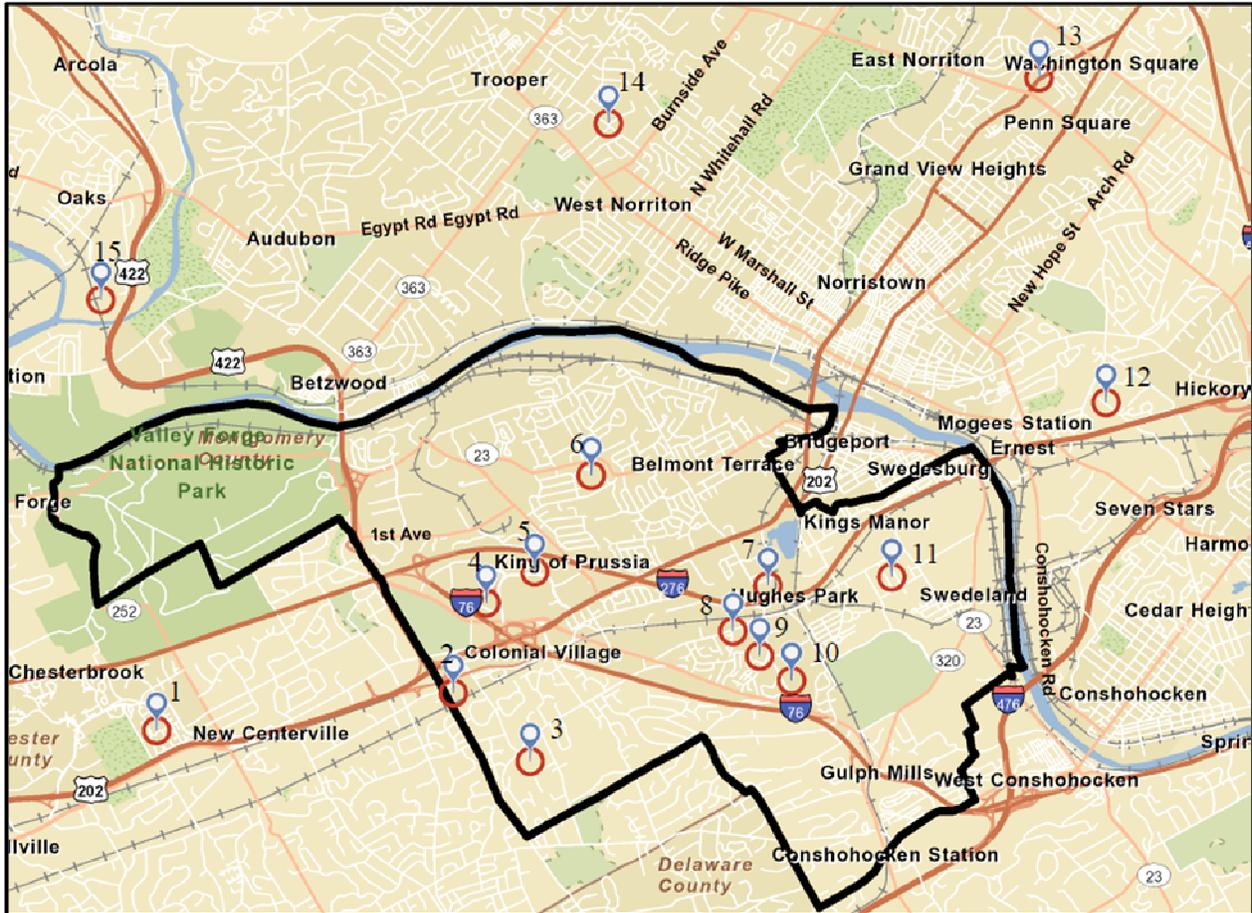


1. Upper Mainline YMCA
2. Roberts Elementary
3. Gulph Gymnasium/Upper Merion Senior Service Center
4. Bridgeport Elementary
5. Belmont Classroom
6. Township Building
7. Candlebrook Elementary
8. Upper Merion High School
9. Upper Merion Middle School
10. Caley Road Elementary
11. Heuser Clubhouse
12. Audubon YMCA





### Map J - Alternative Service Providers – Private Providers & Swim Clubs



- |                                     |                             |
|-------------------------------------|-----------------------------|
| 1. Picket Post Swim & Tennis Club   | 14. Markley Farms Swim Club |
| 2. YSC Sports                       | 15. The Far Post            |
| 3. Martin's Dam Swim Club           |                             |
| 4. Aspiring Champions               |                             |
| 5. Bally's Total Fitness            |                             |
| 6. The Factory Fitness & Sports     |                             |
| 7. Competitive Edge Sports          |                             |
| 8. The Sweat                        |                             |
| 9. Fairmount Athletic Club          |                             |
| 10. Gulph Mills Tennis Club         |                             |
| 11. Upper Merion Dance & Gymnastics |                             |
| 12. Plymouth Swim Club              |                             |
| 13. LA Fitness                      |                             |





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**Summary:** After analyzing the existing indoor recreation providers in the Upper Merion Township area, there is a small market for an additional public recreation facility if it has a clear market focus that is different in some respect from these facilities. Despite the fact that the Township has several smaller recreation amenities and access to school district facilities, these cannot make-up for a more comprehensive public community center with multiple components. The fact that there are no other comprehensive community recreation centers in the greater market area, leaves a market opportunity as does the fact that there is no outdoor public pool in the Township. With a population base of almost 74,000 in the full service area, there is a base to expand the current indoor recreation offerings for the Township. However, there are a significant number of other fitness, sports and aquatics facilities in the market. The primary “competition” for a new public community center will be the YMCA’s who have a similar market orientation.

**Market for a Community Recreation Facility:** With any proposed community recreation facility the issue of the size and qualification of the market for such a facility comes to the forefront.

Reviewing the characteristics of the various markets indicates:

The population of the Upper Merion market area (Township and Secondary Service Area) is just below 74,000 which is an adequate population base to support a community center. Additional users could come from outside the identified market area.

The population of the Upper Merion service area is expected to show only minimal growth for the next five years which will not contribute any significant number of additional users for a facility.

The population of the Upper Merion service areas is older with fewer families but the median household income level is significantly higher than the national number.

The private sector hopes to capture between 10% and 15% of a market area (generally in a 3 to 5 mile radius of the club) while the public sector facilities target a market of 20% to 30% of an area within a 10 to 15 minute driving distance. Non-profits will have a market draw that is somewhere between the two. These differences are directly related to the business practices of the three types of entities. Private facilities are generally a membership based operation where revenues are almost exclusively derived from membership revenues and from program and service expenditures generated from these same individuals. As such it is relatively easy to project market dynamics (distance, eligible households, etc.) for this type of facility. The non-profit sector takes the market a bit further, while still being largely membership based; they often have some limited daily admissions and actively pursue program only members. Program and



service options also extend well beyond the sports and fitness area to include everything from child care, to cultural arts and social programs. This expands the market for recreation services to the 15% to 20% range. Public facilities on the other hand generally have readily accessible daily admissions, some form of extended passes as well as annual passes. In addition there are usually a large number of programs that can be accessed without a membership and also a number of community functions and activities where no fee may be collected at all. Most community recreation facilities operate on an ala carte system which greatly expands the market to a broader spectrum of users based on age, income and travel time. As a result the 20% to 30% market penetration rate is obtainable and the geographic area served is generally much larger. It is not inconceivable that over the course of a year's time over 50% of a community's population will have come to a community recreation facility for some use, function or activity. However, due to the variety of program and service options offered by the public sector, fewer annual passes are generally sold than private or non-profit facilities. On the other side it is relatively common to have individuals and families who have memberships at private or non-profit facilities to access public centers for certain services that are either not offered by the others or are not providing them in a manner that meets their needs.

The market realities put public and private facilities at the opposite end of the market spectrum with the non-profits in the middle but closer to the public market.

The ability of a fitness, sports or recreation facility to capture a market share is based in large part on the amenities that are included in a center, the variety of amenities available, the size of the facility and the fees that are going to be charged.

Based on the information noted above the following estimates are possible.

Noting again that there are estimated to be approximately 74,000 individuals in the Upper Merion Secondary Service Area boundaries, if 15% are captured by the private sector (a high number since there are a relatively large number of facilities in the market) this would result in approximately 11,100 memberships.

Figuring that 15% of the market is being satisfied with the private providers that still leaves the difference between the public and private market rate at 15%. Since there are a number of non-profit providers (YMCA's) but no other public centers in the market area, it is estimated that these facilities will capture approximately 10% of the market which potentially leaves 5% for an Upper Merion Community Center. Capturing 5% of the Upper Merion market would convert to approximately 3,700 users that could be potential annual pass holders. It is also highly likely that there will be a significant number of individuals who are currently members of other sports and fitness facilities that could utilize an Upper Merion facility for certain programs or activities (youth or adult programs) which will add more users for a center.

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Another method to analyze possible participation numbers is to look at the pre-qualified population that is likely to participate in sports activities and look at the realistic percentage of that market that can be captured by a facility. Weekly participation in active recreation activities from individuals in the Upper Merion market can be expected to be somewhere in the range of 15% to 20% of the population which equals approximately 11,100 to 14,800 individuals, (based on 2010 population estimates). If a new center were able to capture 20% of this pre-qualified market this would convert to 2,220, to as many as 2,960 potential annual pass holders.

## **Market Conclusion:**

Below are listed some of the market opportunities and challenges that exist with this project.

### *Opportunities*

- Upper Merion does not currently have a comprehensive community center.
- There is an acute need for an outdoor aquatic center with no public pool and only one private swim club in the community.
- Virtually all of the existing indoor and outdoor pools in the market area are conventional flat water pools with none of the excitement or draw that a leisure pool can bring to a community.
- The Township is highly dependent on the use of school facilities which are not always available for community recreation due to school functions.
- None of the other townships in the immediate area have comprehensive community centers either.
- Despite the presence of a significant number of other providers in the market, the population base is large enough to support another indoor recreation facility that has a different market focus.
- The service area has a high median household income level which will help attract more users, allow for a more aggressive fee structure, and a higher level of cost recovery.
- An indoor community center improves the quality of life in a community and often serves as an economic development engine.

### *Challenges*



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- There are a significant number existing sports, fitness and aquatic facilities in the greater Upper Merion market area. Most of these facilities have a strong fitness orientation as well as other sports amenities. Several (YMCA) also have a strong family focus.
  - There are also a large number of specialty facilities that emphasize indoor soccer, court sports, tennis and gymnastics.
  - The school district already has two 6 lane, 25 yard indoor pools that are available for some public use.
  - Finding an appropriate site to support a community center will be important. A location that allows for easy access for people throughout the service area is essential as is a location that will provide allow for quick access to major thoroughfares for other users.
  - The population is older, with a lower number of families. These are demographic characteristics that are not ideal for the support and use of a public community center.
  - Funding not only the development but the operation of a community center will have to be clearly defined. The facility will have to include fitness and sports amenities if the center is to have any hope of covering its operating costs every year.

### *Project Direction*

Based on the information gathered from the demographic and market analysis, the following is the recommended direction for the project.

- For the project to become a reality, it is absolutely critical that a long term plan to fund the capital construction and possibly even a yearly operational shortfall (if fitness and other sports amenities are not included) is identified. This may require non-traditional financing and/or partnerships to accomplish.
- A site that is large enough to accommodate the full facility program as well as the necessary parking will be essential. The site will also need to have easy access from throughout the market area.
- The project should serve a broad base of recreation needs from active recreation to more passive activities. It will be critical that the center has a strong multigenerational and family focus.
- Ideally the same site should be master planned to add phases in the future.





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## **Section II – Community Center Program**

Utilizing the information that was gathered from the market analysis and through input from staff and the project committee, a series of program options were developed for the community center.

### ***Project Financial Expectations***

In order for the community center to become a reality, it will have to be a cost effective project with strong operational revenue production. Ideally the center would be able to cover its cost of operation plus contribute to the debt service for building the facility.

### ***Indoor Recreation Needs***

Based on information gathered from a variety of sources, including the project committee, public meetings, staff and informal surveys, the following spaces should be considered for inclusion in a community center.

7. Gymnasium
8. Indoor/outdoor pool
9. Fitness facilities
10. Performance space
11. Community rooms/meeting space
12. Arts & crafts room

### ***Market Opportunities***

Utilizing the information from the market analysis portion of the study the following market opportunities have been identified.

4. Gymnasium space to support existing Township recreation programs
5. Classroom/multipurpose space for recreation programming
6. Outdoor pool with a strong leisure orientation

**Programming vs. Operations:** During the programming phase of a community center project it is critical that the operational implications of different components are clearly understood. The choices of recreation amenities and the focus of these components will have a direct bearing on the financial performance of the center once it is built. As a result the following charts should be reviewed prior to making final decisions on the program for the community center.





Chart-K

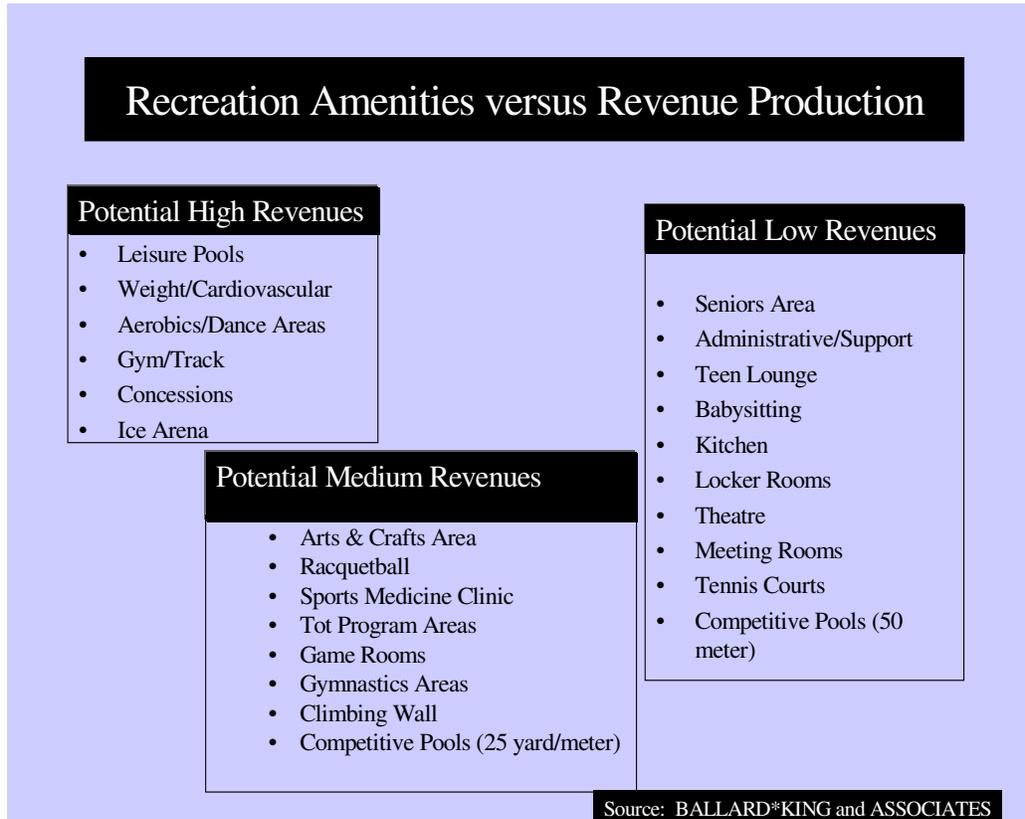


Chart K refers to the revenue potential of various components in a community center. It must be realized that this a generalized assessment and components can move from one category to the other depending on the specific market and operational philosophy of the center.





Chart-L

<b>Estimate of Revenue &amp; Expense Potential</b>		
Component	Expense	Revenue
Art Display Space	Low	Low
Climbing Wall	Low	Medium
Indoor Track	Low	Medium
Game Area (electronic/active)	Low	Medium
Racquetball	Low	Medium
Gymnasium	Low	High
Meeting/Multi-Purpose	Medium	Low
Senior Activity Space	Medium	Low
Pre-School Space	Medium	Low
Gymnastics	Medium	Medium
Indoor Playground	Medium	Medium
Aerobics/Dance Room	Medium	High
Weight/Cardiovascular Space	Medium	High
Competitive Pool (50 meter)	High	Low
Drop-In Child Care	High	Low
Kitchen	High	Low
Conventional Pool (25 yard/meter)	High	Medium
Leisure Pool	High	High

**Source: BALLARD\*KING and ASSOCIATES**

Chart L makes a comparison between the estimated operating cost and the revenue potential of various recreation components that might be found in a community center. Again this is a generalization and the specifics may change based on the particulars of the project.

**Project Options**

There are a number of ways that the Township can approach the development of a community center project. Listed below are a number of options and the pros and cons of each.

**Option 1 – Township Leases Property to a Private or Non-profit Group**





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This scenario involves the Township leasing property to an outside group for the development and operation of a community center type facility.

Pros-

- The Township has no financial involvement in the development of the center.
- The Township will not have the responsibility for operating the center.

Cons –

- With no financial stake in the project, the Township will have virtually no say in what type of facility will be developed. It is highly likely that the center will be a fitness and sports oriented facility.
- The Township will have very little say in how the center is operated, the programs and services that are offered or the fees that are charged. The center will almost certainly be a membership based facility with market driven rates.
- The center will not necessarily serve the community's recreation needs but will focus on what makes the most business sense.
- It may be difficult to find a group with an interest and adequate capital to build such a project.
- Site could be a significant issue as a central location, with good visibility, strong access and adequate parking will be essential.
- If the project were to fail, the Township would in all probability have to take possession of the building and operate the center.

## **Option 2 – Township Builds the Center and it is Contract Operated**

With this option, the township builds the community center to meet its needs but its operation is contracted to an outside agency. This could be a non-profit (YMCA) or a private operator.

Pros –

- The Township will be able to determine which amenities they want to include in the center.



# COMMUNITY CENTER PROGRAM

*Upper Merion Township, PA*



- 
- The building will be built to public facility specifications and materials.
  - The Township will not have the responsibility for operating the center.

Cons –

- The Township will have to fund the construction of the center.
- The Township will not have as much say in how the center is operated, the programs and services that are offered or the fees that are charged. To have more control the Township may have to guarantee a certain level of operational funding as part of the contract.
- The center may not necessarily serve the community's recreation needs but will focus on what makes the most business sense.
- If the contract operator cannot fulfill their role, the Township would have to operate the center.

### **Option 3 – Township Builds and Operates the Center**

This traditional option has the Township responsible for developing and building the center.

Pros –

- The Township will be able to determine which amenities they want to include in the center.
- The building will be built to public facility specifications and materials.
- The facility can be operated in a manner that will best serve the community. This includes programs and services as well as fees.

Cons –

- The Township will have to fund the construction of the center.
- The Township will be responsible for the operation of the center which could include an operational subsidy.



# COMMUNITY CENTER PROGRAM

Upper Merion Township, PA



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## Upper Merion Community Center Program Alternatives:

Several program alternatives have been developed for a possible Upper Merion Community Center. These include:

### *Wish List – High capital cost, middle range cost recovery*

This program contains most of the elements that have been identified for consideration for inclusion in the center.

- Gymnasium
- Indoor Walk/Jog Track
- Pool
  - Indoor Competitive and Leisure
  - Outdoor Leisure
- Party Rooms
- Weight/cardio Equipment Area
- Group Exercise Room
- Theater – 300 seats
- Community Room/w Kitchen
- Teen Area
- Arts & Crafts Room
- Drop-in Child Care
- Classrooms
- Support
  - Locker Rooms
  - Administrative Space
  - Lobby/Control
  - Storage

Approximate Size:	91,550 SF
Capital Cost Estimate:*	\$25,000,000 - \$26,000,000
Operational Subsidy Estimate:	-\$200,000 - -\$300,000



# COMMUNITY CENTER PROGRAM

Upper Merion Township, PA



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## *High Cost Recovery – Lower capital cost, high cost recovery*

This program is based on the concept of the center having the best cost recovery potential.

Gymnasium  
Pool  
Outdoor Leisure  
Party Rooms  
Weight/cardio Equipment Area  
Group Exercise Room  
Group Exercise Studio  
Community Room/w Kitchen  
Drop-in Child Care  
Support  
Locker Rooms  
Administrative Space  
Lobby/Control  
Storage

Approximate Size: 54,250 SF  
Capital Cost Estimate:\* \$12,000,000 - \$13,000,000  
Operational Subsidy Estimate: +\$50,000 - +\$150,000

## *Non-Compete – Middle range capital cost, low cost recovery*

This program does not have most of the elements that are found in other private facilities (fitness related) so there is not direct competition with these providers.

Gymnasium  
Indoor Walk/Jog Track  
Pool  
Indoor Competitive and Leisure  
Outdoor Leisure  
Party Rooms  
Theater – 300 seats  
Community Room/w Kitchen



# COMMUNITY CENTER PROGRAM

Upper Merion Township, PA



Teen Area  
Arts & Crafts Room  
Drop-in Child Care  
Support  
Locker Rooms  
Administrative Space  
Lobby/Control  
Storage

Approximate Size: 79,250 SF  
Capital Cost Estimate:\* \$22,000,000 - \$23,000,000  
Operational Estimate: -\$400,000 - -\$600,000

\* Capital Cost Estimate represents the estimated cost for the years 2010-2011 and includes construction costs plus the identified soft costs for a total estimated project cost.

### *Other Possible Spaces*

Library (to replace the library that is currently at the Township Building)

Senior Citizens Space (depends on future of the existing senior center)

It is critical that the center be organized with a central entry area and point of control. There needs to be a clear separation between the active portions of the building and the passive elements. An emphasis needs to be placed on providing flexible and versatile space that can meet a variety of needs and avoiding the temptation to dedicate space to certain user groups (with the exception of the senior and teen area).

Providing adequate parking for the center will also be of importance. The basic industry standard of one space for each 250 sq.ft. should be utilized for planning purposes.

### **Community Center Space Narratives:**

The following are brief space descriptions and square footage estimates for key amenities that could be included in an Upper Merion Community Center.

**1. Gymnasium** - A space that is approximately 14,000 sq.ft. and divisible into two gym areas (each with 50' by 84' basketball court or full sized volleyball court) by a drop curtain. The gym





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should be set up for a variety of activities including basketball and volleyball. Portable seating should be by tip and roll bleachers.

**2. Walk/jogging track** - A 10 ft wide elevated track that runs around the perimeter of the gym and other spaces that can be used for walking or jogging. Approximately 6,500 sq.ft.

**3. Indoor Aquatics area** - A space of approximately 18,000 sq.ft. that includes a 25 yd. 8 lane competitive/lap pool (one, one meter board and water depth of 4 ft. to 13 ft., and seating for up to 200), a free form leisure pool (at least 4,000 sq.ft.) with slides, interactive play features, a small on deck spa, lazy river, 2 lap lanes, and zero depth entry. The two pools are separated by a glass wall. The space must include an office for the pool supervisor (120 sq.ft.) and a space for a lifeguard/first-aid room (200 sq.ft.) as well as storage (300 sq.ft.).

**4. Outdoor aquatics area** – An outdoor space of approximately 15,000 sq.ft. that includes a free form leisure pool (at least 5,000 sq.ft.) with slides, interactive play features, a small on deck spa, small lazy river, 3 lap lanes, and zero depth entry. A large deck space and fenced in grass area needs to be included along with extensive shade structures. The space must be directly accessible from the building and include an office for the pool supervisor (120 sq.ft.) and a space for a lifeguard/first-aid room (200 sq.ft.) as well as storage (400 sq.ft.). Mechanical space for the pool will also have to be included (up to 1,000 sq.ft.). The entire area should be lighted. A small covered entry/fee desk should be added to allow direct exterior access to the aquatics area as an option.

**5. Party rooms** – Two rooms of 350 sq.ft. each that are located directly next to the pool. These rooms are utilized for birthday parties as well as small meetings and aquatic classes.

**6. Weight/cardiovascular space** - An area of at least 5,000 sq.ft. to as much as 7,500 sq.ft, that includes free weights, selectorized machines, and cardiovascular equipment. Two assessment rooms (120 sq.ft. each) are located immediately next to this space.

**7. Group fitness room** - A space of approximately 2,000 sq.ft. that can be used for fitness, martial arts or other class instruction. The room must have its own sound system and a floating wood floor.

**8. Fitness studio** – A studios of 1,000 sq.ft. to be used for specialized classes such as yoga, Pilates and other activities.

**9. Spinning studio** – A room of 1,000 sq.ft, to be used for spinning classes.

**10. Theater** – Sloped floor theater seating for up to 300. This space would also function as a space for presentations, conferences and other events. Approximately 8,000 sq.ft.



# COMMUNITY CENTER PROGRAM

*Upper Merion Township, PA*



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**11. Community room(s)** - A space of approximately 3,600 sq. ft. that can be divided into three smaller rooms for multiple functions. A raised stage area of approximately 600 sq.ft. that is located at one end and can be closed off from the community room. This stage area can also be used as a small classroom. The community rooms could also serve as informal performance space as well.

**12. Kitchen** - A catering kitchen that is attached to the community room and has outside access for deliveries. Approximately 500 sq.ft.

**13. Teen room** – An area of approximately 2,000 sq.ft. that includes a video game area, TV lounge, pool tables, food service area and a small computer space.

**14. Arts & Crafts Room** – A room of approximately 1,000 sq.ft. with hard surfaced floor that can be used for a variety of arts and crafts or other programs (plus necessary storage 300-400 sq.ft.).

**15. Drop-in childcare area** – A room of approximately 1,200 sq.ft. that is designed for drop-in baby-sitting. A downsized unisex restroom must be included as well as access to an outdoor fenced-in play space.

**16. Indoor playground** - A space of approximately 2,000 sq.ft. that would have a large two level, themed play structure with rubberized padded floors. The entry area would include a place to take off and store shoes, benches for parents, and a small unisex restroom. The indoor playground should be located next to the babysitting room

**17. Classrooms** – Two rooms of approximately 900 sq.ft. each that can be used for a variety of classes and programs including light crafts.

**18. Senior activity area** – An area of approximately 3,500 sq.ft. that includes a reception desk and a small office area, open lounge space, billiards table area and senior service provider rooms (2 small clinic rooms of 120 sq.ft. each).

**19. Support spaces** - There must be sufficient space and resources allocated for the following:

- Lobby/lounge space
- Front desk area
- Office space for facility/program staff
- Staff conference room/Public meeting
- Locker rooms
- Family locker room



# COMMUNITY CENTER PROGRAM

*Upper Merion Township, PA*



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Maintenance office and work area  
Restrooms  
Vending  
Storage  
Other spaces

## **Upper Merion Community Center Final Program:**

After considerable discussion with the community, Township staff, and elected officials, a final program was established that represented the indoor recreation needs of the community balanced with the capital and operational costs.

Also, with a realization that the existing Upper Merion Township library was too small and ultimately a new building was needed, a possible program for this space was added to the community center.

This program was developed by Kimmel Bogrette Architecture + Site.



# COMMUNITY CENTER PROGRAM

Upper Merion Township, PA



**UPPER MERION  
RECREATIONAL CENTER  
FINAL PROGRAM**

**RECREATIONAL PROGRAM**

ROOM NAME	NUMBER OF ROOMS	L	W	AREA	OVERALL	
					AREA	
GYMNASIUM	1	120	100	12,000	12,000	
INDOOR TRACK	1	400	18	7,200	7,200	
NATATORIUM	1	104	104	10,816	10,816	
PARTY ROOMS	4	20	40	800	3,200	
CARDIO AND FITNESS	2	40	90	3,600	7,200	
COMMUNITY ROOM	1	40	40	1,600	1,600	
CHILD WATCH	1	20	40	800	800	
LOCKER ROOMS	4	20	40	800	3,200	
ADMINISTRATIVE AREA REC.	1	40	30	1,200	1,200	
LOBBY-RECEP.	1	20	24	480	480	
POOL STORAGE	1	12	24	288	288	
PHYS ED STORAGE	2	12	24	288	576	
TRACK STORAGE	1	12	24	288	288	
GENERAL ATHLETIC STORAGE	1	20	24	480	480	
GENERAL BUILDING STORAGE	1	20	24	480	480	
STAFF LOCKERS/OFFICE	2	12	12	144	288	
BOILER ROOM	1	24	32	768	768	
ELECTRICAL ROOM	1	24	24	576	576	
POOL MECHANICAL ROOM	1	32	48	1,536	1,536	
VERTICAL CIRCULATION	3	12	24	288	864	
PUBLIC TOILETS	2	12	34	408	816	
<b>NET AREA</b>					<b>54,656</b>	<b>SQFT</b>
PARTITIONS AND CHASES @2%					1,093	
INTERNAL CIRCULATION @8%					4,372	
<b>INTERIOR SQUARE FOOTAGE</b>					<b>60,122</b>	<b>SQFT</b>
EXTERIOR WALLS @ 5%					3,006	
<b>GROSS SQUARE FOOTAGE</b>					<b>63,128</b>	<b>SQFT</b>



# COMMUNITY CENTER PROGRAM

Upper Merion Township, PA



LIBRARY PROGRAM	NUMBER OF ROOMS	SIZE		AREA	OVERALL AREA
		L	W		
ADULT LIBRARY	1	88	48	4,224	4,224
TEEN LIBRARY	1	24	40	960	960
STUDY ROOM	5	8	8	64	320
CHILDRENS LIBRARY	1	88	48	4,224	4,224
CHILDRENS READING ROOM	1	24	24	576	576
CHILDRENS LIBRARY TOILETS	2	5	8	40	80
CHILDRENS LIBRARIAN	1	12	12	144	144
WORK ROOM	1	12	18	216	216
MOTHERS ROOM	1	12	12	144	144
CONFERENCE ROOM	1	12	12	144	144
CAFÉ BOOKSTORE	1	40	24	960	960
BOOK DROP	1	8	12	96	96
VESTIBULE	1	12	12	144	144
MAIN CIRCULATION DESK	1	40	20	800	800
MAIN WORK ROOM	1	24	32	768	768
MDF	1	10	10	100	100
ADMINSTRATION AREA	1	24	48	1,152	1,152
PUBLIC TOILETS	2	12	32	384	768
PROGRAM CENTER	1	40	60	2,400	2,400
PROGRAM CENTER STORAGE	1	20	16	320	320
STAGE	1	24	12	288	288
PROGRAM CENTER KITCHEN	1	16	20	320	320
VERTICAL CIRCULATION	3	12	24	288	864
BOILER ROOM	1	24	32	768	768
ELECTRICAL ROOM	1	24	24	576	576
<b>NET AREA</b>					<b>21,356 SQFT</b>
PARTITIONS AND CHASES @ 2%					427
INTERNAL CIRCULATON @ 8%					1,708
<b>INTERIOR SQUARE FOOTAGE</b>					<b>23,492 SQFT</b>
EXTERIOR WALLS @ 5%					1,175
<b>GROSS SQUARE FOOTAGE</b>					<b>24,666 SQFT</b>
<b>OVERALL BUILDING AREA</b>					<b>87,794 SQFT</b>





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### Section III – Site/Concept/Cost Analysis

Based on the final program that was developed for the project, Kimmel Bogrette Architecture + Site completed a site analysis for three locations and developed concept plans and capital cost estimates for each.

#### **Overview:**

Three potential sites were analyzed to determine which would be the most suitable for construction of a new Recreational Center and Library for the Township. The three sites; **Heuser Park**, **Gold's Gym** and **Allendale**, vary by size, topography, adjacent uses, orientation and access considerably.

To ensure an “apples to apples” comparison of the three sites, the same building program was used for each alternative. This building program reflects the consensus reached by Township officials at a previous work session with the design team. Any variances in the designs are due to site constraints.

#### Design Goals

- Provide a community center suitable for a variety of uses for all Township residents
- Provide a balance of activities at one location “heart, body and soul”
- Provide 100% accessibility for disabled persons
- Provide a healthy physical environment for all user groups
- Provide a hub to support other learning or recreational activities in the Township
- Promote and apply sustainable design principals
- Provide appropriate acoustic and visual separation for a variety of uses--loud and quiet, passive and active
- Provide a clear means of vehicular and pedestrian access to site and positive outdoor spaces
- Permit controlled use “7-24-365” all times of day and year.
- Develop a positive image and curb appeal—be a good neighbor

Based on initial study information, the Community Center will be approximately 60,000 square feet and the Public Library will be about 24,000 square feet for an overall facility size of 84,000 gross square feet. The overall concept is to provide two functions within one building, with shared facilities as a connecting link. Specialty functions such as the pool or the library reading room would have the greatest degree of separation and privacy, while shared spaces like the program center and party rooms would be readily accessible to either rec. or library users.





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To minimize the amount of land used for construction, all design solutions have at least some second story spaces, and in the case of the Allendale site, four stories of construction. The Allendale site is also unique in that it requires structured parking and utilizes an existing office space to house the public library component.

### **Site Analysis:**

Each of the three sites analyzed vary quite a bit in size, topography, existing structures, and adjacency to other recreational activities, site access and solar orientation. These differences in site require three similar but differing approaches to the design of each facility.

The ideal site/building configuration would meet these parameters as follows:

- Safe and clear means of pedestrian and vehicular access to the site
- Minimize disruption to existing site amenities
- Maintain as much open space as possible
- Design buildings which can blend in and adapt to existing topography minimizing site development costs
- Provide north light for the main library reading rooms and major recreational spaces, enter the facility from the south east, and provide a variety of sunny and shady spaces for outdoor use.
- Provide a separate identity for both major functions (library and recreation) within one building.
- Be a community center—in other words, permit the two user groups to mix and interact in shared spaces.
- Permit access to the site for both recreational use groups and library use groups.
- Accommodate service and maintenance areas
- Plan for future expansion





### Heuser Park



This 35 acre site is already used for Township recreational activities, with three athletic fields, three baseball and softball diamonds, roadways, parking and ancillary structures. The Schuylkill River is to the North, low density residential developments are to the east and south, and additional Township property used by the township's maintenance department, is to the west. Our building site (including parking) would use about 8 acres of land in the north-west corner of the site.

Primary vehicular access would be from the existing main access road to Heuser Park, with pick-up drop off areas for library users, recreational users and for maintenance/service. Automobile parking would be broken up into smaller lots with landscaped buffers to maintain the sense of openness and connection to nature already on site, and some of the existing playfield parking would be re-worked and incorporated into the overall site concept.

Pedestrians would be able to access and egress the building from all four sides, but would also pass by wither the library circulation desk or recreational center main desk immediately after entering. While final site grading has not been developed for the purposes of this study, the overall design intent is to provide 100% accessibility for disabled persons for all components of the building, parking areas and site.

The overall building organization is a grid. The west to east axis addresses the programmatic organization and the south to north axis addresses levels of openness or privacy in use. The

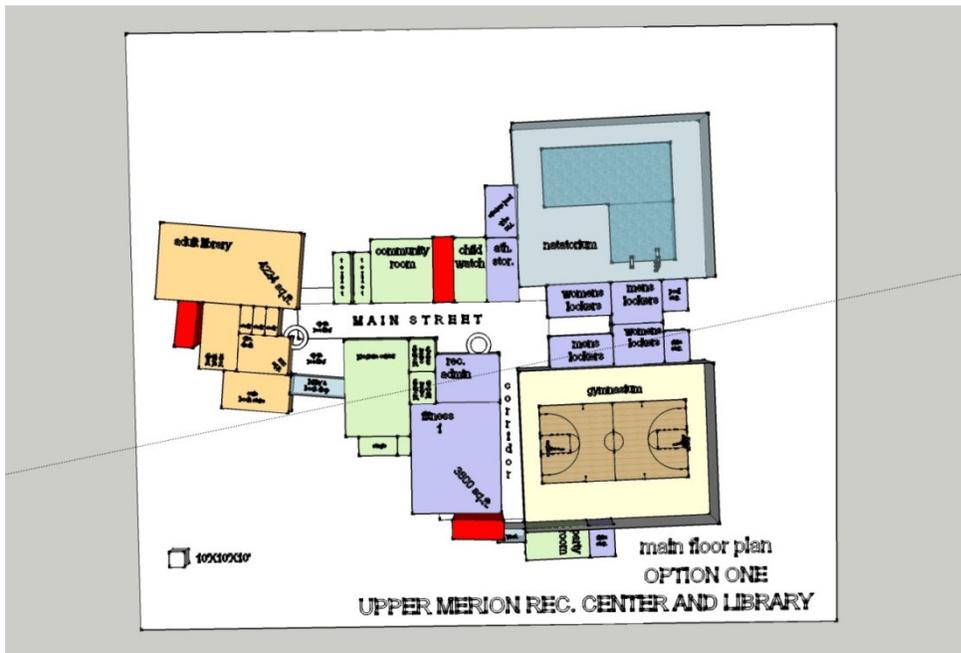


# SITE/CONCEPT/COST ANALYSIS

## Upper Merion Community Center Study

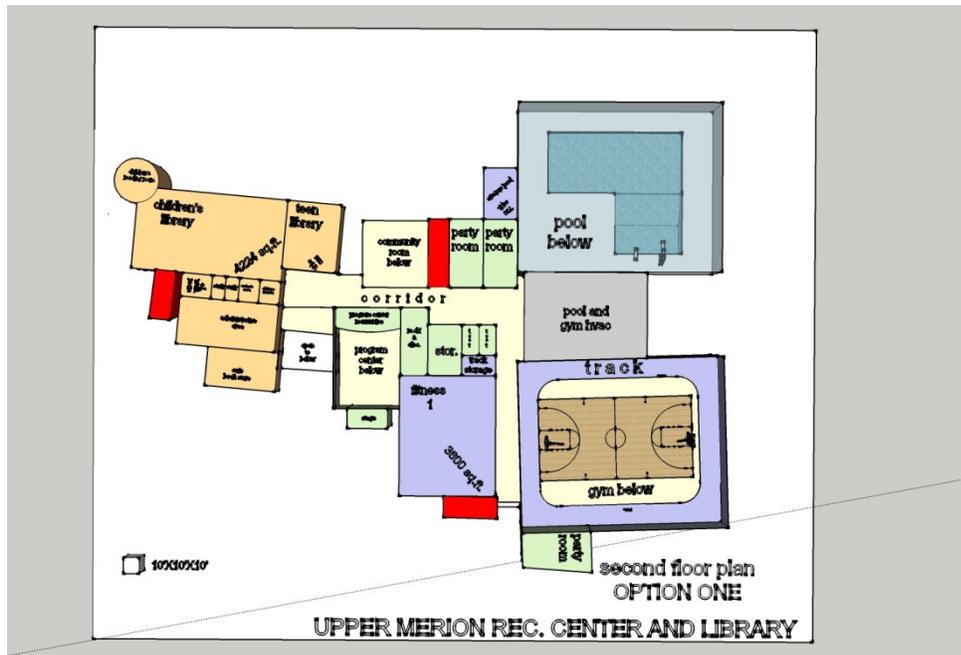


library program occupies the west side of that grid, the shared spaces are in the center, and the recreational functions are on the east side of the grid. The gymnasium and locker rooms are located to the east to provide a site adjacent to existing athletic fields. The more public areas are organized along the south end of this grid, e.g. the entries, the book store and the party rooms, while areas requiring quiet--such as the reading rooms, or a greater level of modesty-- such as the pool are located to the north.



# SITE/CONCEPT/COST ANALYSIS

## Upper Merion Community Center Study



This is not a rigid grid it is flexible, this concept permits the final design elements to be rotated and aligned at varying floor elevations to blend better into the site and make a stronger connection to the outdoors. This additive approach also lends itself to phased construction, if it were determined, for example that the recreational center would be constructed prior to the library.

A similar logic is applied to the vertical organization of the building. The entries, of course, are on the ground level and the pool and gym are also located on grade to minimize construction costs. The running track, suspended in the gym structure, would be accessed directly from the second floor. The main reading rooms are stacked vertically to simplify construction, and to address the varying level of maturity in users groups at the children's and the adult reading room.

While the program components are organized to reflect their function, they are also connected literally and visually by a two story atrium at the main entry and a "main street" running east and west to connect the two major building components. The overall goal is to provide architecture which fosters a sense of community in this community center.



### Gold's Gym



This 20 acre site contains about seven acres of buildable area. It was formerly the location of a swim club, and any new construction would first require the demolition of existing structures and the pool. The site is bounded to the north and west by single family residential construction, to the east by a large industrial structure, and to the south by a steeply sloping wooded area. Our building site (including parking) would use about 6 acres of land in the north end of the site.

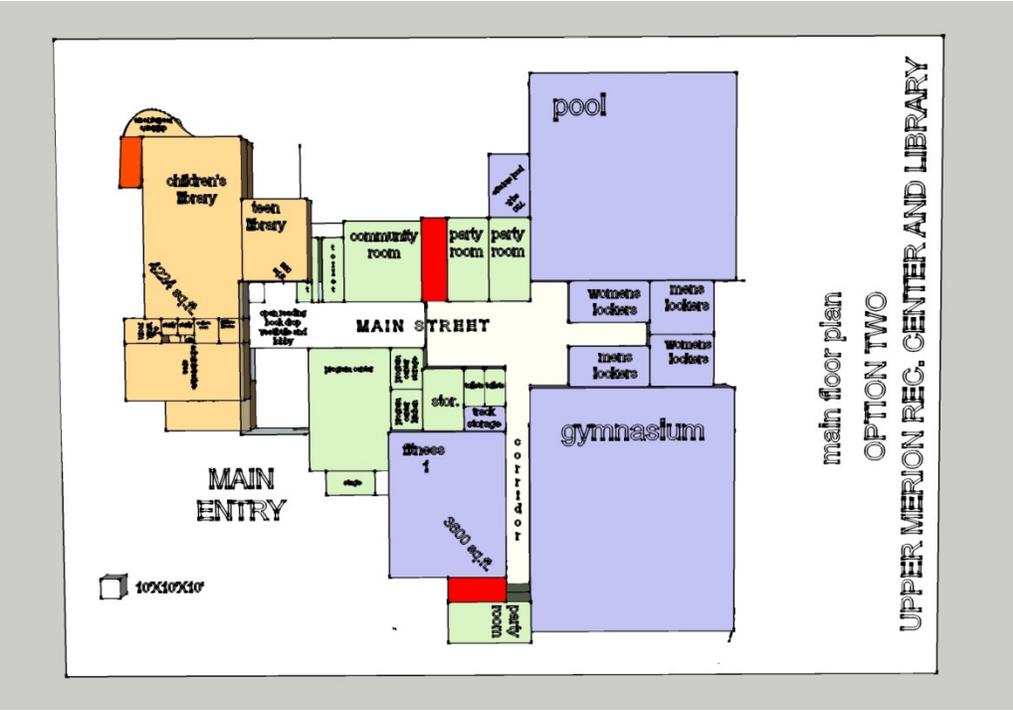
Primary vehicular access would be from West Valley Forge Road with a combined pick-up drop off area for library and recreational users. Automobile parking would be broken up into smaller lots with landscaped buffers to maintain the sense of openness and connection to nature already on site, and to fit on to this sloping site.

The building's main entry would face north, directly visible from the main access road. The site slopes from west to east, the gymnasium and pool's large volumes could be reduced by berming them into the hill. Our overall intent would be to blend in, rather than over shadow this established residential neighborhood.



# SITE/CONCEPT/COST ANALYSIS

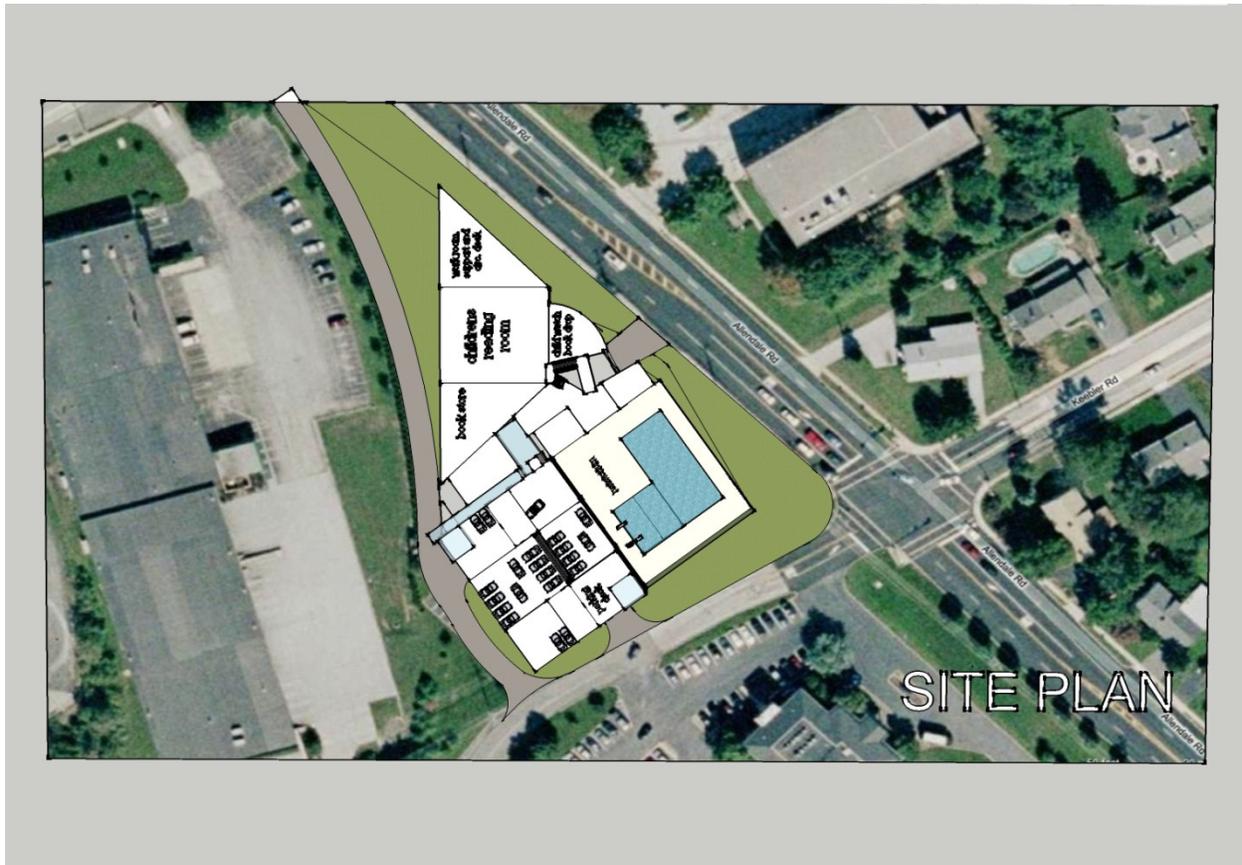
## Upper Merion Community Center Study



The overall building organization is very similar to the overall organization of the facility proposed for the Heuser Park site. One notable exception is the need to re-orient the library reading room perpendicular rather than parallel to the major axis of the building to fit on to this narrow site. To reconcile the relatively steep grades on site with the proposed facility, internal level changes and/or external retaining walls would be required.



### Allendale



This one acre site is currently occupied by a two story office building and surface parking. The existing office building could be re-used as a library—it is roughly the size of the key library components. This building is not suitable for recreational purposes; floor to floor heights are not adequate for athletic activities, and interior columns and openings for stair wells limit opportunities for adaptive re-use as a recreational center.

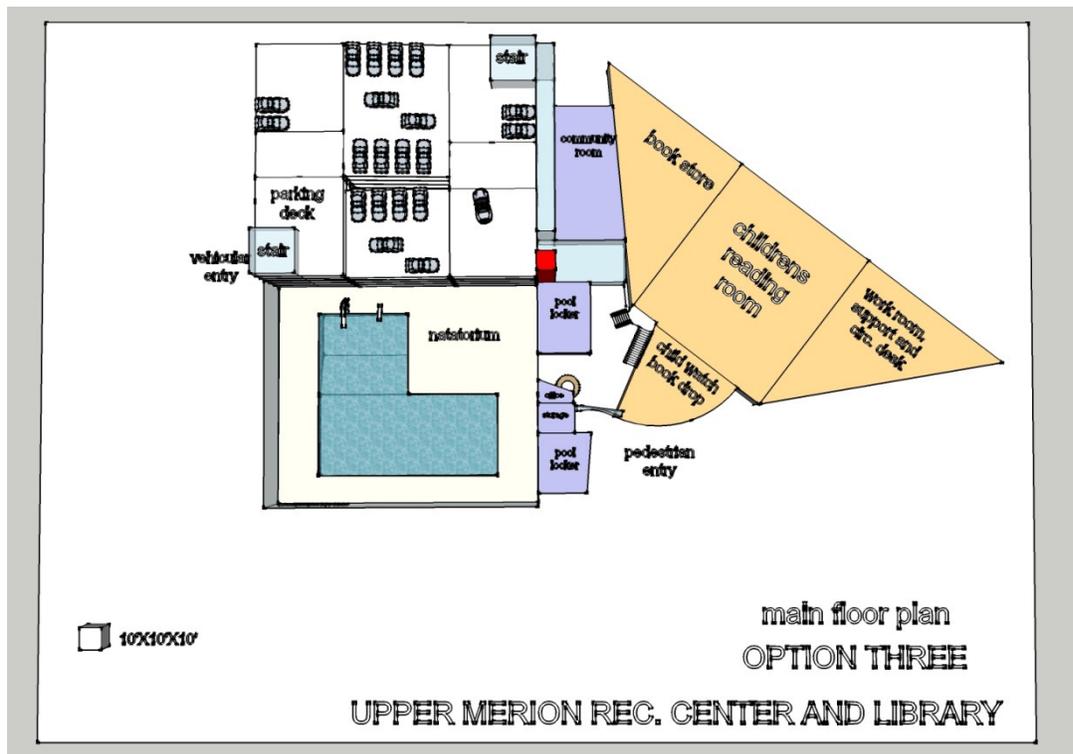
Because the site is so small, a multi-story parking structure and building solution would be required to fit all programmatic elements and required parking on to the site. The design solution depicts a four story addition and structured parking adjacent to the existing building, which would be converted into the library. Structured parking would be located to the rear of the site. This parking structure, depending on its final configuration, will be approximately as high as the building addition, and would physically connect to that structure. The differential in floor heights would be addressed to permit handicapped access to all levels of the building and parking garage.

# SITE/CONCEPT/COST ANALYSIS

## Upper Merion Community Center Study

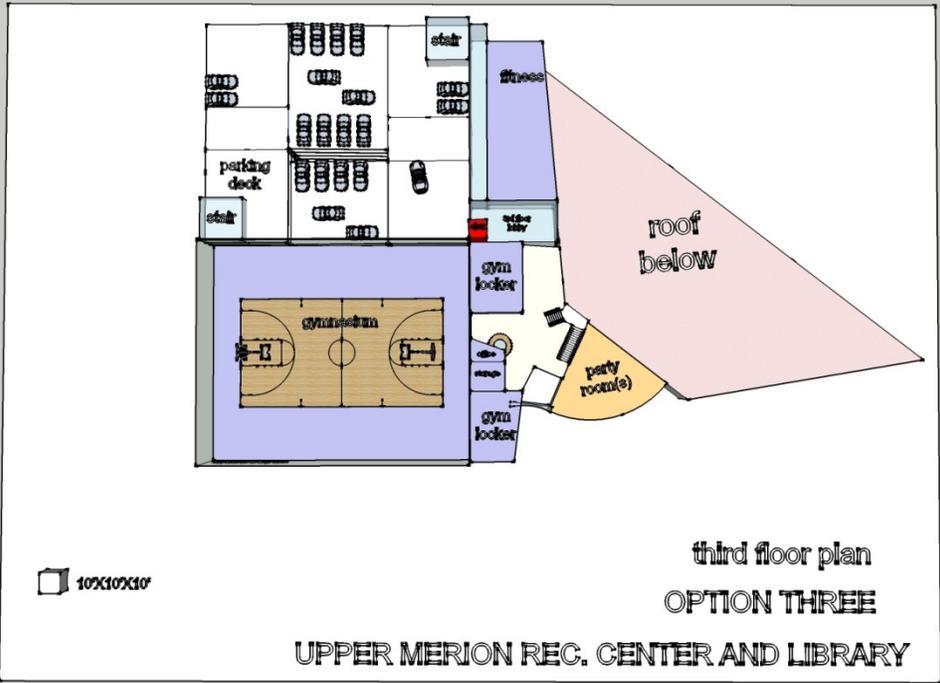
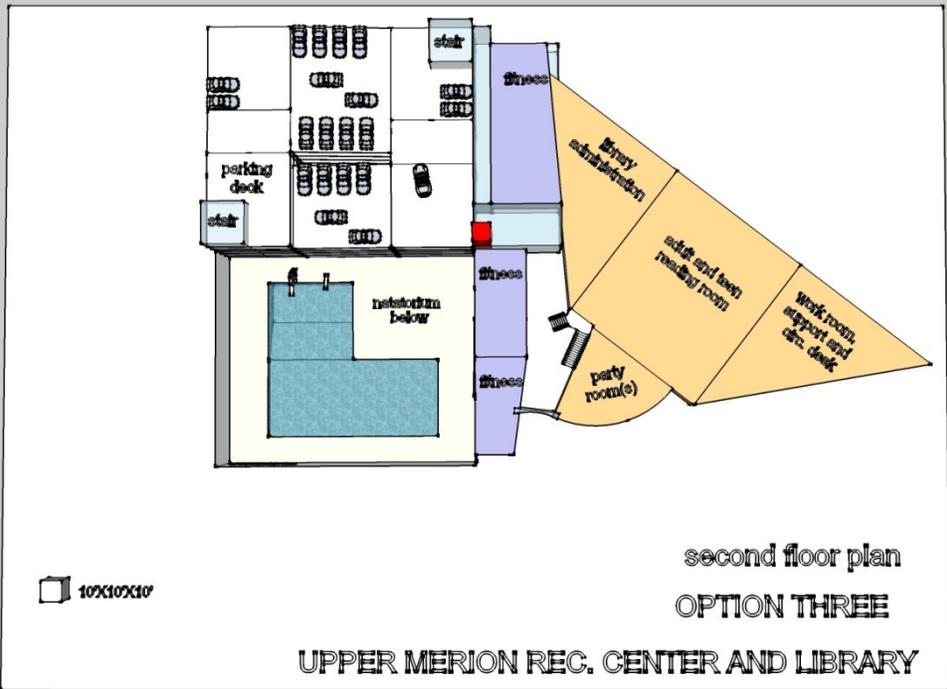


The four story addition would house the main lobby, pool, pool locker rooms, and shared amenities on the main floor. The second floor would house the fitness centers, party rooms and contain the larger volume of the pool below. The third floor would house the gymnasium, gym lockers, an additional fitness room and party room. The fourth floor would provide access to the running track, suspended within the gymnasium volume, the program center and support spaces.



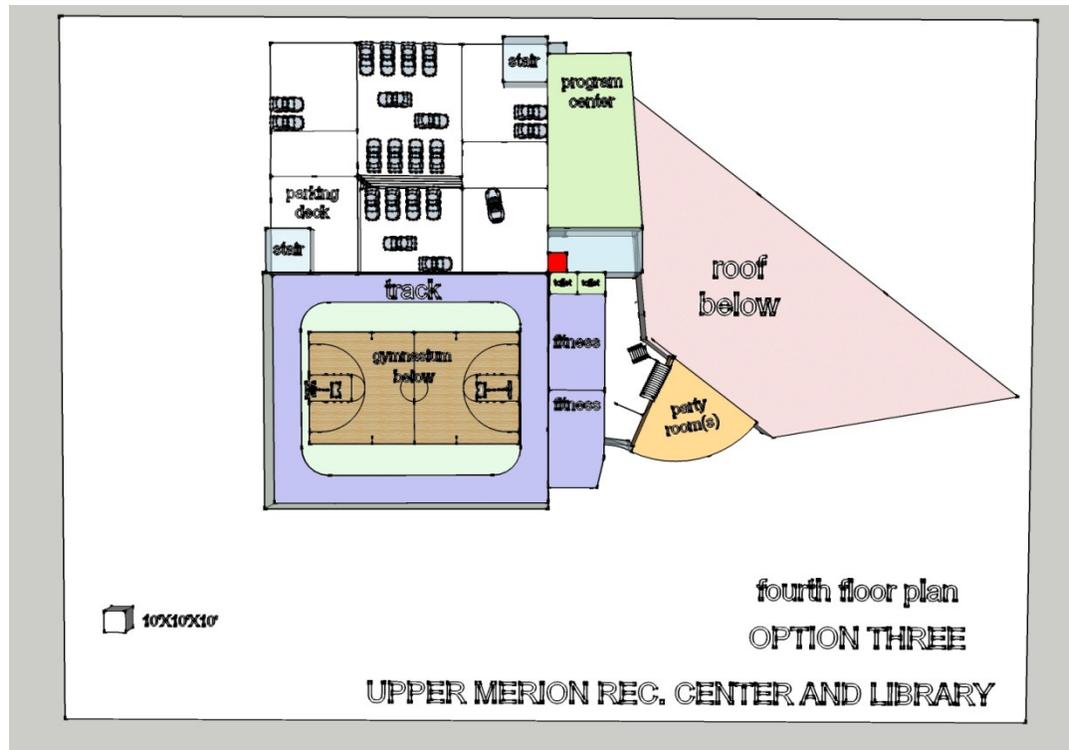
# SITE/CONCEPT/COST ANALYSIS

## Upper Merion Community Center Study



# SITE/CONCEPT/COST ANALYSIS

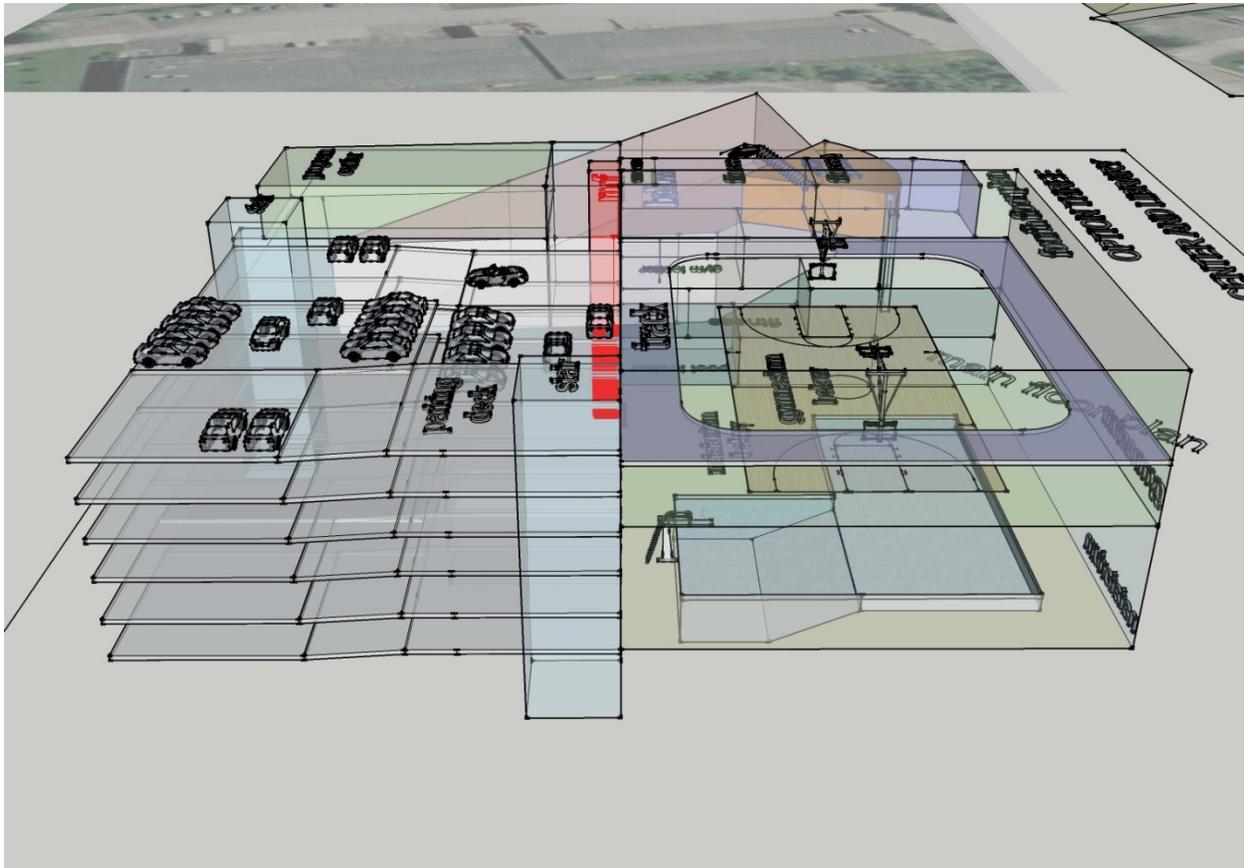
## Upper Merion Community Center Study



This is a complex design solution. Physically connecting the four story addition to the existing two story office building and connecting the parking structure to the recreational component will require careful code and structural analysis. Construction of a gymnasium over a pool, while technically feasible, would be likely to add cost.

# SITE/CONCEPT/COST ANALYSIS

## Upper Merion Community Center Study



More importantly, the connection between program spaces becomes more fragmented, and user groups would have less of a visual and spatial connection to other program areas, which would make this design solution function less effectively as a community center. User groups, moving between activities, would be using stairs and elevators rather than the “main street” discussed in the other options, and the sense of community would be diminished.

### Cost Estimate:

All three sites were evaluated with respect to construction cost making the assumption that construction would start in 2012, and that the construction duration would be continuous and would proceed with a practical construction schedule. Each site differs due to existing structures on site, topography and site size, and without knowing the exact start date for construction it is impossible to finalize a construction schedule, but we will assume it could range anywhere from 15 to 18 months, for costing purposes only.

In the process of developing these cost estimates it was determined that the square foot cost for a public library and for a recreational center of this size was fairly comparable. In the recreational

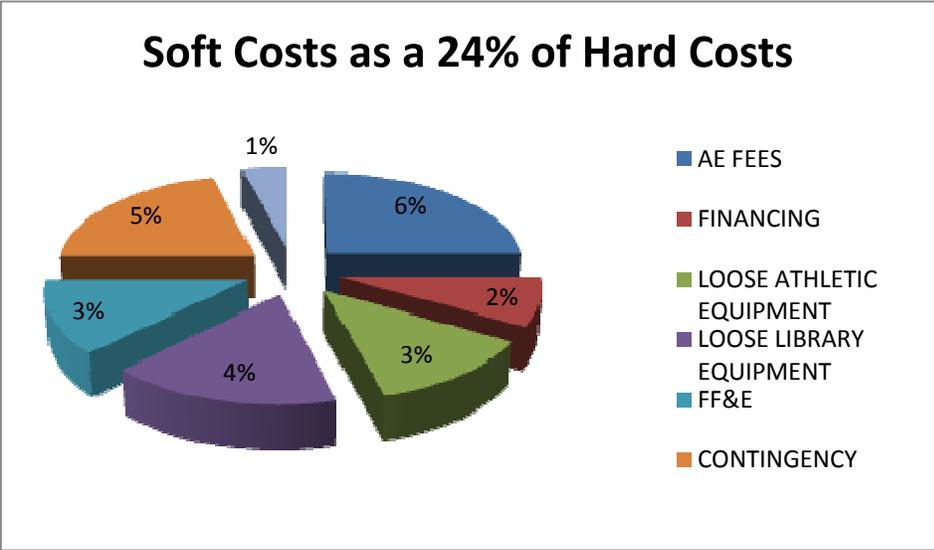
# SITE/CONCEPT/COST ANALYSIS

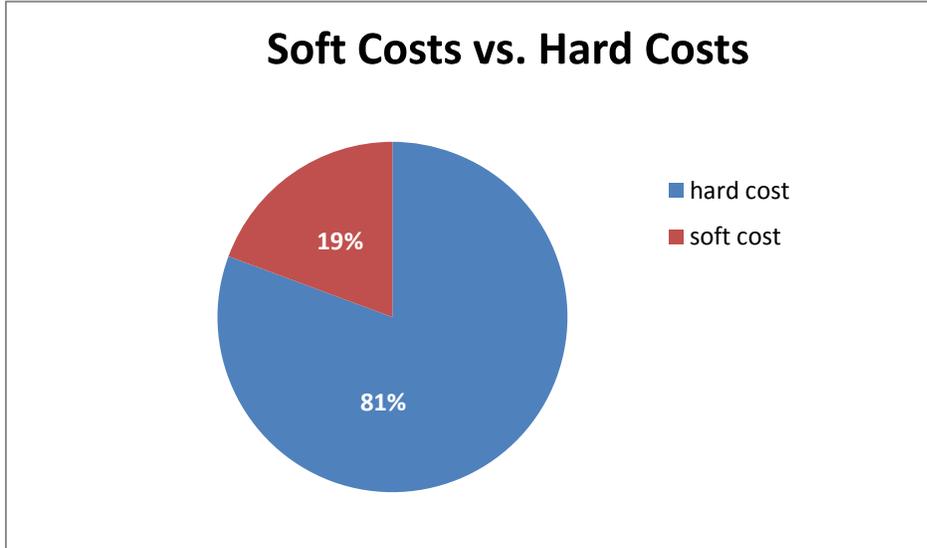
## Upper Merion Community Center Study



area the pool would be relatively more expensive than other spaces, and in the library area the Program Center and Main Library collection areas would be relatively more expensive than other spaces. For the purposes of the study the building has been considered as a whole. Also note that there is an economy of scale associated with construction of one larger facility rather than two separate ones, and for two separate facilities on two different sites.

Because the design has not been finalized, the estimate has been developed parametrically with adjustments made for unique aspects of the design. Key parameters are: site, demolition, building shell, core, fit-out, mechanical, electrical and plumbing and structured parking. Construction cost includes items which would require installation by the contractor, while soft costs provide a FF&E (furniture, fixtures and equipment) account for items which could be purchased and provided directly by the owner. The soft cost breakdown includes fees and services required beyond items bid by contractors and assumes that a construction manager would not be used.





# SITE/CONCEPT/COST ANALYSIS

Upper Merion Community Center Study



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## COST ESTIMATE SUMMARY

Heuser Park

Item	Cost
SITE	\$1,540,000
DEMOLITION	\$0
SHELL	\$5,500,000
CORE	\$3,300,000
FIT-OUT	\$2,600,000
MEP	\$9,060,000
STRUCTURED PARKING	\$0
TOTAL CONSTRUCTION COST	\$22,000,000

Land Acquisition

No Cost, Township Owned

### SOFT COSTS @

AE FEES	\$1,320,000
FINANCING	\$440,000
LOOSE ATHLETIC EQUIPMENT	\$660,000
LOOSE LIBRARY EQUIPMENT	\$1,100,000
FF&E	\$440,000
CONTINGENCY	\$1,100,000
LAND DEVELOPMENT	\$220,000
SOFT COST SUB-TOTAL	\$5,280,000

**TOTAL PROJECT COST** **\$27,280,000**



# SITE/CONCEPT/COST ANALYSIS

*Upper Merion Community Center Study*



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## COST ESTIMATE SUMMARY

### Gold's Gym

Item	Cost
SITE	\$1,796,000
DEMOLITION	\$200,000
SHELL	\$5,500,000
CORE	\$3,300,000
FIT-OUT	\$2,600,000
MEP	\$9,060,000
STRUCTURED PARKING	\$0
TOTAL CONSTRUCTION COST	\$22,456,000

### Land Acquisition

No Cost, Township Owned

### SOFT COSTS @

AE FEES	\$1,459,640
FINANCING	\$449,120
LOOSE ATHLETIC EQUIPMENT	\$660,000
LOOSE LIBRARY EQUIPMENT	\$1,100,000
FF&E	\$440,000
CONTINGENCY	\$1,347,360
LAND DEVELOPMENT	\$224,560
SOFT COST SUB-TOTAL	\$5,680,680
TOTAL PROJECT COST	\$28,136,680



# SITE/CONCEPT/COST ANALYSIS

## Upper Merion Community Center Study



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### COST ESTIMATE SUMMARY

#### Allendale

Item	Cost
SITE	\$1,070,000
DEMOLITION	\$50,000
SHELL	\$3,845,250
CORE	\$3,525,500
FIT-OUT	\$2,600,000
MEP	\$8,864,000
STRUCTURED PARKING	\$6,600,000
<b>TOTAL CONSTRUCTION COST</b>	<b>\$26,554,250</b>

#### Land Acquisition

To Be Determined (See Below)

#### SOFT COSTS @

AE FEES	\$1,858,798
FINANCING	\$531,085
LOOSE ATHLETIC EQUIPMENT	\$660,000
LOOSE LIBRARY EQUIPMENT	\$1,100,000
FF&E	\$440,000
CONTINGENCY	\$1,327,713
LAND DEVELOPMENT	\$265,543
<b>SOFT COST SUB-TOTAL</b>	<b>\$6,183,138</b>

#### TOTAL PROJECT COST

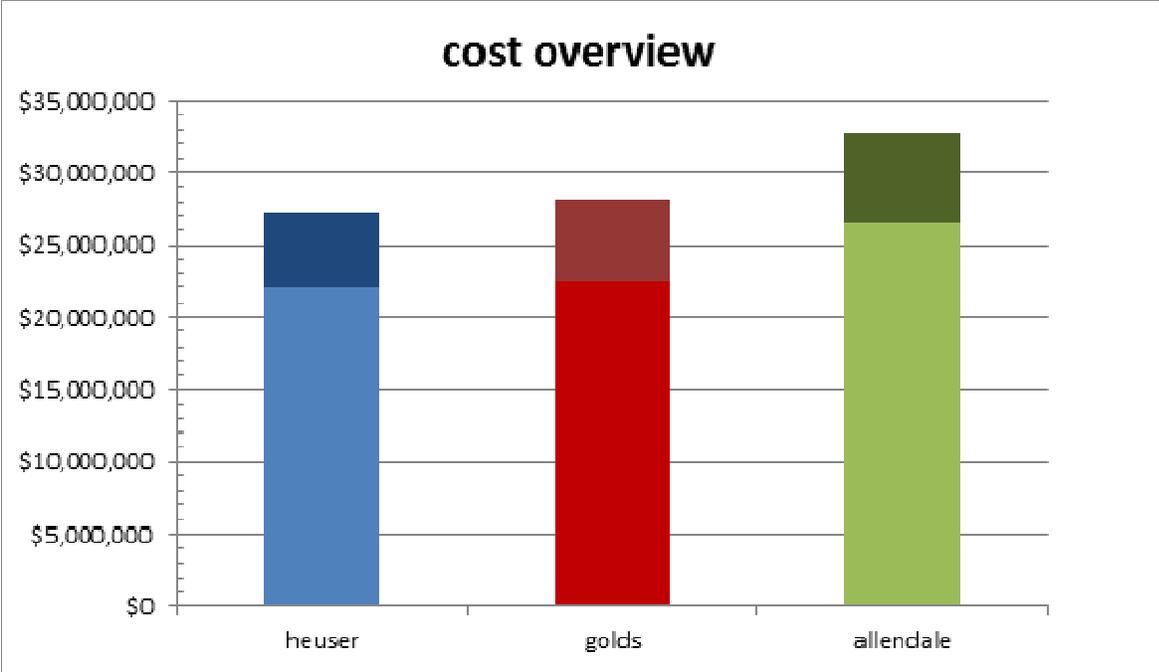
**\$32,737,388**

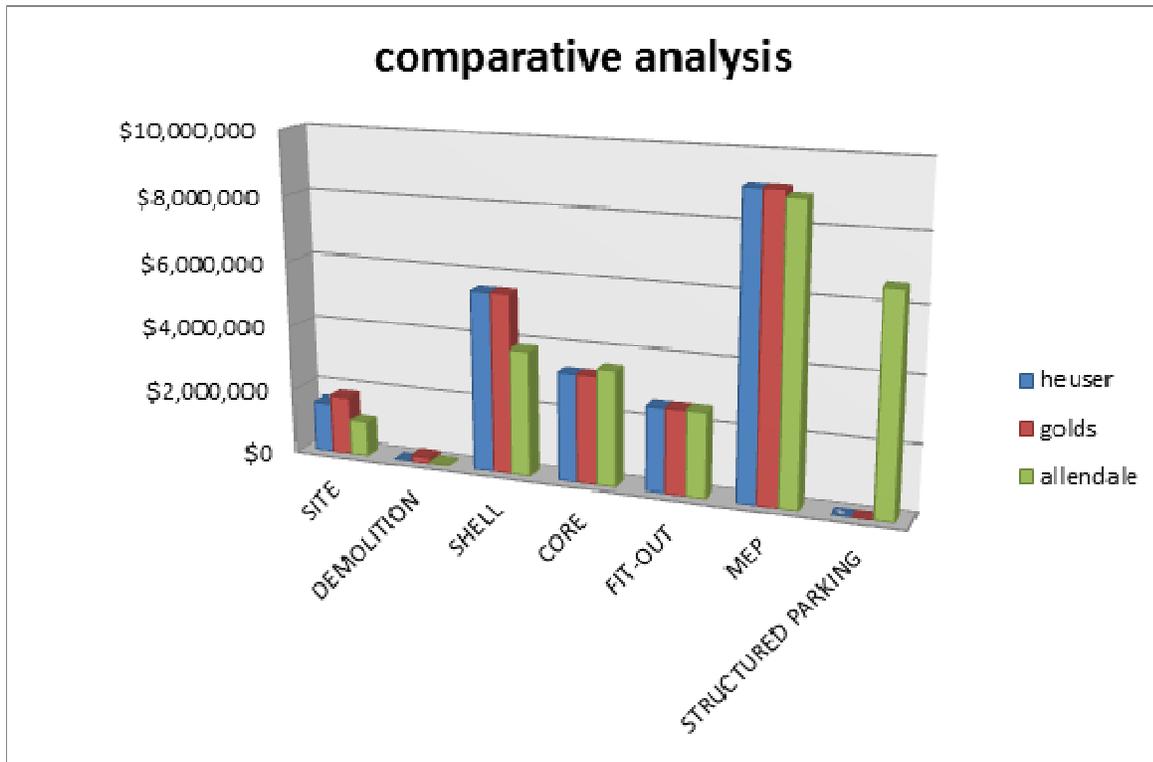
As you can see from the three cost estimates, Heuser Park is the least expensive at \$22,000,000, Gold's Gym would cost about \$500,000 more at \$22,500,000 and Allendale would cost about \$26,500,000 in construction cost. Overall project costs would be \$27.3M, \$28.1M and \$32.7M respectively. This does not include the cost of land/acquisition at Allendale (or other privately owned sites). This could be another \$3,000,000 or more. Detailed discussion of cost follows below:



# SITE/CONCEPT/COST ANALYSIS

Upper Merion Community Center Study





### Decision Making Parameters:

#### Cost

All three sites meet the basic program and memorable design goals, but vary quite a bit with respect to other key parameters. These key parameters include first cost, constructability, access to outdoor spaces, opportunities for future expansion, simplicity in achieving code compliance, and adjacency to related uses.

Heuser Park is an easy site to develop with respect to cost because it is open, relatively flat, adequately sized and free of existing construction.

The Gold's Gym site presents some constraints due to topography and existing construction.



The Allendale site initially would seem to be a cost-effective solution due to the differential in renovation costs versus new construction. This is more than offset due to the complexity of construction of the addition. At Allendale, the structured parking, the connection from new to existing, the connection from the structured parking to recreational center, the need to place the gymnasium over the natatorium result in the most costly design solution.

### ***Constructability***

Heuser Park is easy to construct. There is room to build, and room for construction logistics, and construction would have little impact on neighboring residents. Standard construction techniques and the ability to locate the large program elements on grade would make this the easiest solution with respect to construction techniques.

Gold's Gym would require more thought. Beginning with the bulk demolition of existing structures, and the likelihood of the need for either internal level changes or exterior retaining walls, would make this a more complicated project, the grade and winding geometry of West Valley Road, would make access for construction vehicles and delivery of construction materials more difficult and expensive. This is adjacent to several private residences, which would be impacted by construction activity.

The Allendale design can be completed, but construction techniques associated with large scale office or commercial construction would be needed rather than the relatively simple methods used at other sites. The optimal construction approach would be to use standard steel frame construction at the addition and typical pre-cast concrete parking garage construction at for structured parking, but this would involve more trades and sub-contractors for a project of this size. This problem is compounded by the lack of lay down space for logistics and materials and the high volume of traffic on Allendale Road. Buildings of this type have been constructed throughout the King of Prussia area, so it is possible, but not practical.

### ***Connection to Open Space***

Heuser Park clearly has the most potential for a connection to outdoor spaces, because it would be located in a public park next to existing athletic fields, and has adequate space on site for outdoor amenities to support the library functions. There also is adequate space for future expansion.

While the Gold's Gym site is located on a relatively large and mostly wooded site, its narrow and irregular shape, along with steep grades would make it difficult to take advantage of adjacent outdoor spaces. There is however adequate space for an outdoor area adjacent to the library.





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The Allendale site would be almost entirely covered with the building footprint, and would have little open space.

### ***Future Expansion***

Both Heuser Park and Gold's Gym have adequate space on site for a significant future addition such as a future outdoor pool. There would be no potential future expansion of the Allendale site.

### ***Simplicity of Code Compliance***

All three sites would be developed to meet or exceed applicable life safety and handicapped codes. The Heuser Park site would be more easily accessed from site or parking by a handicapped person, and a single elevator would provide access to the upper level.

The Gold's Gym site would require a combination of careful site grading, ramps and possibly additional lifts to provide barrier free access. During final design, the most cost effective solutions would be determined.

The Allendale site would require additional elevators with more stops, due to its having four rather than two floors. An additional complexity would be that to optimize parking efficiency, the floor elevations of the structured parking would not align with the main floor levels of the recreational center. Egress stairs would require landings and to all levels, both parking and building, and the elevator would require two doors, one opening to the parking levels and one opening to the recreational center levels. Because the library component is located in an existing structure, existing stairs, doors, hard ware and toilet rooms might require significant modification. The line between structured parking and recreational center would require a fire rated assembly for four stories on two sides of the structure. Fire protection and mechanical systems for this type of multi-story construction require more fire-rated chases and penetrations through floor construction. While all of this is technically feasible, it contributes to additional cost and or construction duration.

### ***Land Acquisition and Lost Tax Revenue***

In that both the Heuser Park site and Gold's Gym site is already owned by the Township, there would be no land acquisition costs associated with either. At the Allendale site (or any other privately owned site) there would likely either be a substantial acquisition cost or a long-term lease expense that would likely hamper the feasibility of this site. Similarly, if the Allendale site (or any other privately owned site) is acquired, either it will be taken off of the tax rolls and this represents a loss in revenue or the tax cost would be added to the lease amount and have a similarly negative effect on the feasibility of this site.



# SITE/CONCEPT/COST ANALYSIS

*Upper Merion Community Center Study*



**Conclusion:**

	HEUSER	GOLD'S	ALLENDALE
COST	+	O	-
CONSTRUCTABILITY	+	O	-
SUSTAINABILITY	+	+	+
ACCESS TO OUTDOOR SPACE	+	+	-
FUTURE EXPANSION	+	O	-
SIMPLICITY WITH RESPECT TO ADA COMPLIANCE	+	-	-
ADJACENCY TO RELATED USES	+	+	O
CENTRAL LOCATION	-	+	+
IMPACT TO TAX REVENUE	O	O	-
LAND ACQUISITION NOT REQUIRED	+	+	-
RATING	7	4	-5

The three sites, rated with respect to design, construction and first cost would be rated as follows:

1. Heuser Park
2. Gold's Gym
3. Allendale

This conclusion should also be weighed with respect to other parameters such as operational costs, maintenance costs and overall benefits to the Township in general for each site.



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## **Section IV - Operations Analysis**

The following operations analysis has been completed for the planned Upper Merion Community Center. The following are the basic parameters for the project.

- The first year of operation will be 2014 or later.
- The presence of other providers in the market will remain the same.
- The operations plan is based on a very basic conceptual plan for the center only.
- The center will be operated by Upper Merion Township.
- All operations and business services will be handled in house by the facility.
- **The center is being shown with a possible library attached. However, no operational expenses or revenues have been shown for this aspect of the facility.**
- The Township will not actively utilize the existing school district pools.
- No partnerships with other organizations have been shown in this operations plan.
- No ongoing use or rental of space in the facility has been shown.
- The estimate on the number of 3 month and annual passes that will be sold is reasonably aggressive.
- A reasonably aggressive approach to estimating use and revenues from programs and services taking place at the facility has been used for this pro-forma.
- No provision for any type of concessions has been shown (other than vending).





**Division I - Expenditures**

Expenditures have been formulated based on the costs that are typically included in the operating budget for this type of facility. The figures are based on the size of the center, the specific components of the facility and the projected hours of operation. Actual costs were utilized wherever possible and estimates for other expenses were based on similar facilities in Pennsylvania. All expenses were calculated as accurately as possible but the actual costs may vary based on the final design, operational philosophy, and programming considerations adopted by staff.

**Facility Description** – Recreation/lap pool, gymnasium, walk/jog track, child watch, weight/CV area, community rooms, party room, lobby, locker rooms and administration area  
 – **Approximately 63,000 sq.ft. (the library is not included in this operations plan)**

**Operation Cost Model: - Based on the facility being built at Heuser Park**

<b>Personnel</b>	
Full-Time	\$590,800
Part-Time	\$648,552
<b>TOTAL</b>	<b>\$1,239,352</b>

<b>Commodities</b>	
Office Supplies (forms, paper, etc.)	\$12,000
Chemicals (pool)	\$30,000
Maintenance/Repair/Materials	\$30,000
Janitor Supplies	\$22,000
Rec. Supplies	\$80,000
Uniforms	\$5,000
Printing/Postage	\$20,000
Items for Resale	\$8,000
Other	\$5,000
<b>TOTAL</b>	<b>\$212,000</b>



# OPERATIONS ANALYSIS

## Upper Merion Community Center Study



<b>Contractual</b>	
Utilities (gas & electric) <sup>4</sup>	\$283,500
Water/Sewer	\$30,000
Insurance (property & liability)	\$50,000
Communications (phone)	\$10,000
Contract Services <sup>5</sup>	\$75,000
Rent Equipment	\$4,000
Marketing/Advertising	\$20,000
Training (staff time)	\$5,000
Conference	\$4,000
Trash Pickup	\$6,000
Dues & Subscriptions	\$1,000
Bank Charges (charge cards, EFT)	\$30,000
Other	\$5,000
<b>TOTAL</b>	<b>\$523,500</b>

<b>Capital</b>	
Replacement Fund	\$50,000
<b>TOTAL</b>	<b>\$50,000</b>

<b>All Categories</b>	
Personnel	\$1,239,352
Commodities	\$212,000
Contractual	\$523,500
Capital	\$50,000
<b>TOTAL EXPENSE</b>	<b>\$2,024,852</b>

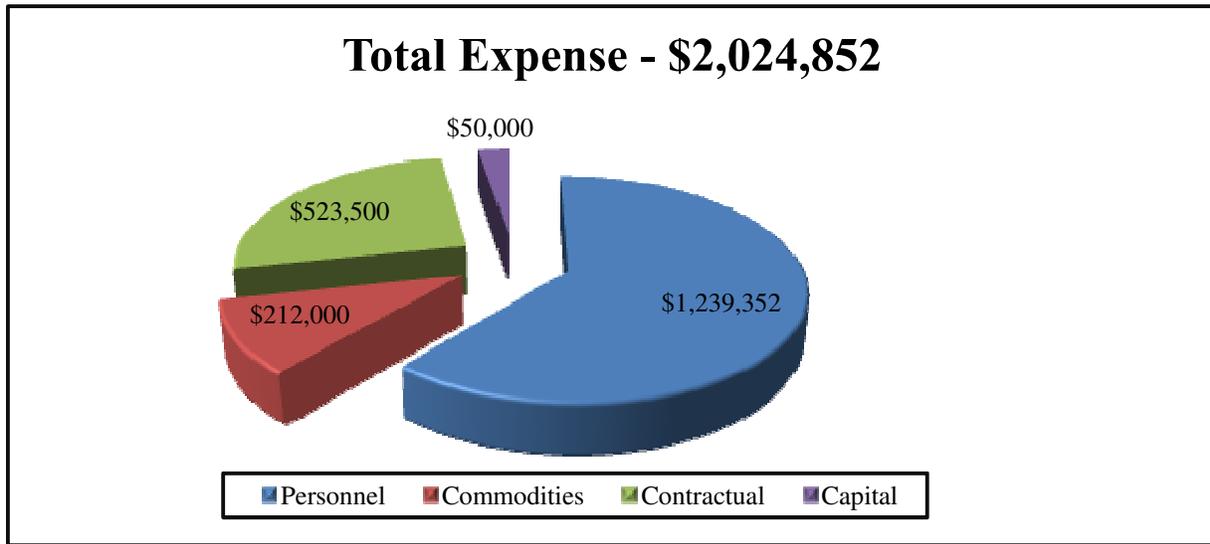
**NOTE:** Line items not included in this budget are exterior site maintenance and any vehicle costs.

<sup>4</sup> Based on a cost of \$4.50 a sq.ft. It should be noted that rates for gas and electric have been very volatile and could result in a substantially higher cost for utilities over time.

<sup>5</sup> Contract services cover maintenance contracts, control systems work, alarm, HVAC services and other items.



**Graphic Representation of Total Expenses:**



# OPERATIONS ANALYSIS

*Upper Merion Community Center Study*



**Staffing Levels:**

<b>Full-Time Positions</b>	<b>Positions</b>	<b>Total</b>
Center Manager	1	\$55,000
Aquatics Supervisor	1	\$42,000
Recreation Coordinator-Fitness	1	\$37,000
Recreation Coordinator-General	1	\$37,000
Marketing Specialist	1	\$35,000
Maintenance Foreman	1	\$40,000
Custodian	2 @ \$28,000 ea	\$54,000
Front Desk Supervisor	2 @ \$30,000 ea	\$60,000
Head Lifeguard	2 @ \$30,000 ea	\$60,000
Salaries		\$422,000
Benefits (40%)		\$168,800
<b>TOTAL</b>	<b>12 F.T.E.</b>	<b>\$590,800</b>

Note: Pay rates were determined based on Upper Merion Township job classifications and wage scales for similar positions. The positions listed are necessary to ensure adequate staffing for the facility's operation. **The wage scales for both the full-time and part-time staff positions reflect an anticipated wage for 2014. It is anticipated that most of the existing full-time recreation staff will have operational and program responsibilities at the center as well. The two existing part-time permanent secretaries would be replaced by the Front Desk Supervisor positions.**



# OPERATIONS ANALYSIS

*Upper Merion Community Center Study*

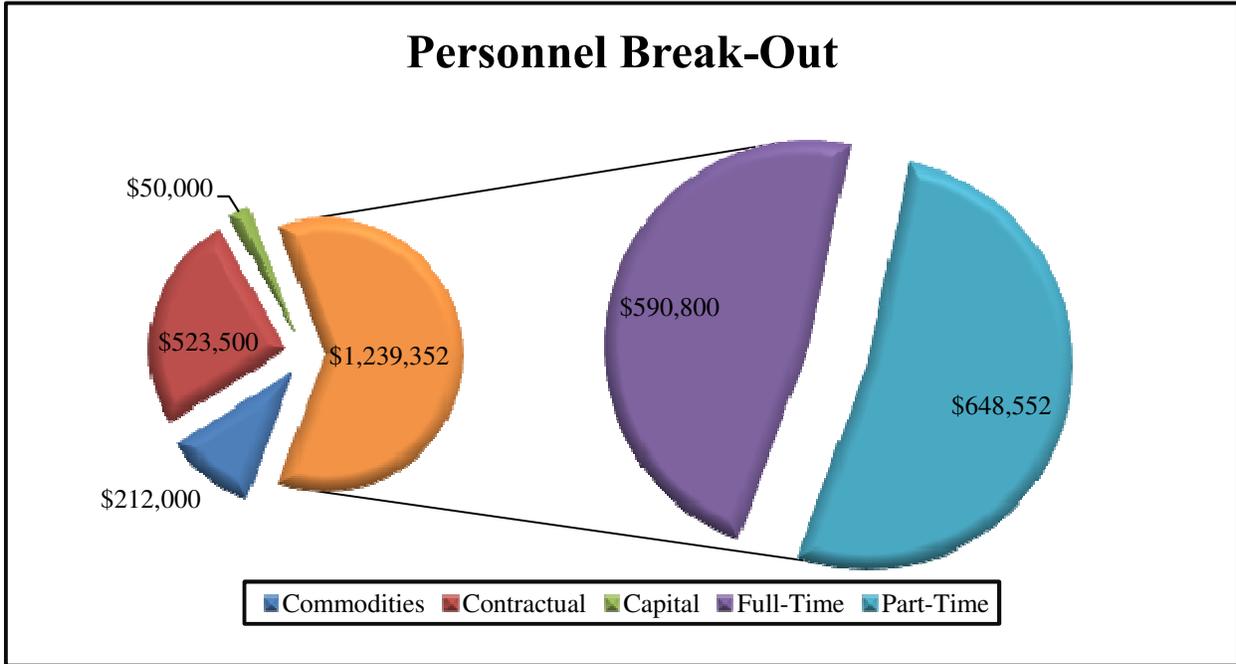


<b>Part-Time Positions</b>	<b>Rate/Hour</b>	<b>Hours/Week</b>
Front Desk Supervisor	\$10.50	29
Front Desk Attendant	\$8.00	139
Weight/CV Room Attendant	\$8.00	218
Gym/Attendant <sup>6</sup>	\$8.00	37
Custodian	\$10.00	85
Child Watch Attendant	\$8.00	102
Lifeguard	\$9.00	358
<b>Program Instructors<sup>7</sup></b>		
Aquatics	Variable	\$44,015
General	Variable	\$119,360
Salaries		\$589,593
Benefits (10%)		\$58,959
<b>TOTAL</b>		<b>\$648,552</b>

<sup>6</sup> Position (and hours) is six months (26 weeks) only, due to heavier use of the facility during the winter months.

<sup>7</sup> Program instructors are paid at several different pay rates and some are also paid per class or in other ways. This makes an hourly breakdown difficult. Aquatics includes lessons, fitness and other activities. General programs consist of sports leagues, fitness, instructional classes, and other activities.







## Division II - Revenues

The following revenue projections were formulated from information on the specifics of the project and the demographics of the service area as well as comparing them to state and national statistics, other similar facilities and the competition for recreation services in the area. Actual figures will vary based on the size and make-up of the components selected during final design, market stratification, philosophy of operation, fees and charges policy, and priorities of use.

### Revenue Projection Model:

<b>Fees</b>	
Daily Fees	\$167,915
3 Month Passes	\$211,775
Annual Passes <sup>8</sup>	\$1,115,850
Corporate/Group	\$30,000
Rentals <sup>9</sup>	\$68,370
<b>TOTAL</b>	<b>\$1,593,910</b>

<b>Programs</b>	
Aquatics	\$99,857
General	\$389,688
Contract Programs	\$5,000
<b>TOTAL</b>	<b>\$494,545</b>

<sup>8</sup> Figures are based on an active program to promote the sale of monthly and annual passes.

<sup>9</sup> Rentals are based on the following:

Community Room	\$75 x 4/wk x 50 wks =	\$15,000
Community Room	\$500 x 35 rentals =	\$17,500
Gymnasium	\$50 x 2/wk x 26 wks =	\$2,600
Party Room	\$35 x 2/wk x 50 wks =	\$3,500
Pool	\$300 x 1/wk x 50 wks =	\$15,000
Entire Center	\$1,000 x 10/hrs =	\$10,000
Non-Resident	30% of rentals x 25%	\$4,770



# OPERATIONS ANALYSIS

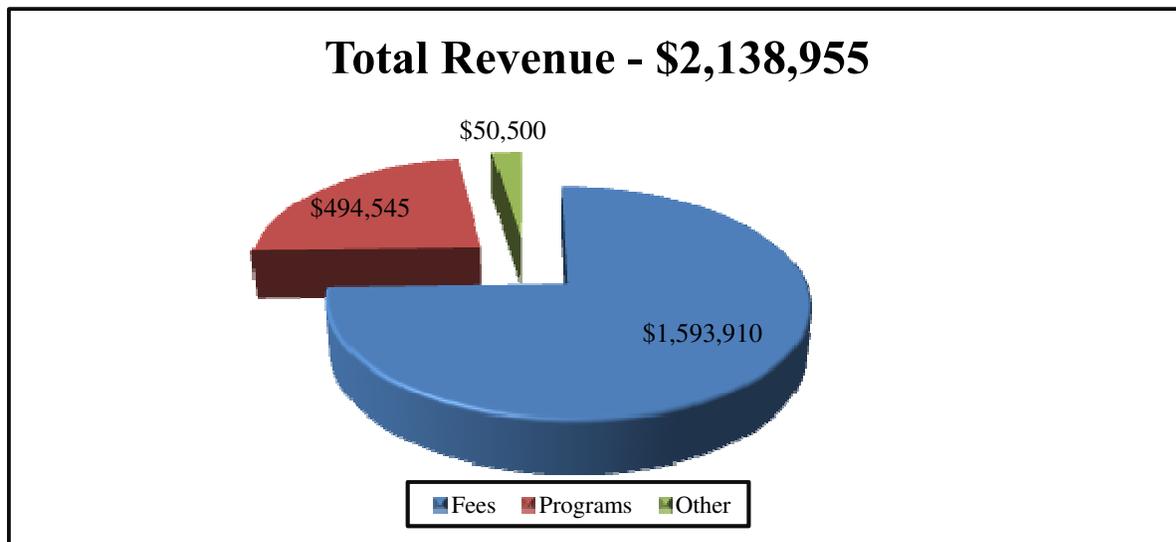
*Upper Merion Community Center Study*



<b>Other</b>	
Resale Items	\$10,000
Special Events	\$4,000
Vending	\$15,000
Drop-in Child Care	\$21,500
<b>TOTAL</b>	<b>\$50,500</b>

<b>All Categories</b>	
Fees	\$1,593,910
Programs	\$494,545
Other	\$50,500
<b>TOTAL REVENUE</b>	<b>\$2,138,955</b>

**Graphic Representation of Total Revenue**





**Division III - Expenditure - Revenue Comparison**

**Community Center at Heuser Park Site – Option One**

Category	
Expenditures	\$2,024,852
Revenues	\$2,138,955
Difference	+\$114,103
Recovery Rate	106%

**Community Center at Gold’s Gym Site – Option Two**

- The concept plan for the center is basically the same so there are no anticipated changes in the overall cost of operation.
- With a site that is more internal to the township, this will have a small impact on facility use by non-residents resulting in lower revenue

Category	
Expenditures	\$2,024,852
Revenues	\$2,104,355
Difference	+\$79,503
Recovery Rate	104%

**Community Center at Allendale Site – Option Three**

- With a four level facility the cost of staffing will be higher and the cost of maintaining the parking deck will also have to factored into the operation.
- It is anticipated that revenues will be similar to Option Two.

Category	
Expenditures	\$2,118,852
Revenues	\$2,104,355
Difference	-\$14,497
Recovery Rate	99%



# OPERATIONS ANALYSIS

## *Upper Merion Community Center Study*



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This operations pro-forma was completed based on general information and a basic understanding of the project with a preliminary program and concept plan for the center. As a result, there is no guarantee that the expense and revenue projections outlined above will be met as there are many variables that affect such estimates that either cannot be accurately measured or are not consistent in their influence on the budgetary process.

**Future Years:** Revenue growth in the first three years is attributed to increased market penetration and in the remaining years to continued population growth. In most recreation facilities the first three years show tremendous growth from increasing the market share of patrons who use such facilities, but at the end of this time period revenue growth begins to flatten out. Additional revenue growth is then spurred through increases in the population within the market area, a specific marketing plan to develop alternative markets, the addition of new amenities or by increasing user fees.





**Division IV - Fees and Attendance**

**Projected Fee Schedule:** The fee schedule has been figured utilizing an approximate 25% fee differential for non-residents. Revenue projections and attendance numbers were calculated from this fee model. It is anticipated that this fee schedule will be for a facility that opens in 2014.

Category	Daily	3 Month		Annual	
		Res.	Non-Res.	Res.	Non-Res.
Adults	\$10.00	\$150.00	\$190.00	\$395.00	\$495.00
Adult Couple	N/A	\$225.00	\$280.00	\$595.00	\$745.00
Youth (3-17 yrs)	\$8.00	\$110.00	\$140.00	\$295.00	\$370.00
Senior (60+)	\$8.00	\$110.00	\$140.00	\$295.00	\$370.00
Senior Couple	N/A	\$165.00	\$205.00	\$445.00	\$555.00
Family <sup>10</sup>	N/A	\$320.00	\$400.00	\$850.00	\$1,065.00

It is projected that basic fitness classes will be included with all annual passes.

Fitness            \$10/class

Corporate	10% discount	5 or more monthly/annuals
	15% discount	10 or more monthly/annuals
	20% discount	15 or more monthly/annuals

Rentals	\$75/hr	Community Room (non-prime time)
	\$500/4 hr	Community Room (4 hour min., prime time)
	\$50/hr	Gymnasium (per court)
	\$35/hr	Party Room
	\$300/hr	Pool
	\$1,000/hr	Entire Center

Child Care        \$3.00/per hour

<sup>10</sup> Includes 2 adults and up to 4 children living at the same address.





**Admission Rate Comparisons:** The above rates were determined based on the competition in the area and the rates paid at similar facilities in the market area.

**Greater Plymouth Community Center**

Category	Daily	1 Month		3 Month		Annual	
		Res.	Non-Res.	Res.	Non-Res.	Res.	Non-Res.
Primary Adult	\$10.00	\$53	\$72	\$160	\$215	\$395	\$535
Primary Youth Senior	\$8.00	\$42	\$57	\$125	\$170	\$310	\$420
Additional Youth	N/A	\$10	\$12	\$30	\$35	\$70	\$80
Additional Adult/Senior	N/A	\$20	\$22	\$60	\$65	\$140	\$155

**Audubon YMCA**

Category	Monthly Rate
Adult	\$40.00
Youth	\$18.00
Family <sup>11</sup>	\$53.00

This is a full-facility membership but does not include the use of other YMCA's.

<sup>11</sup> Includes 2 adults and their dependents living at the same address.





**Spring Valley YMCA**

Category	Monthly Rate
Adult	\$58.00
Youth	\$29.00
Senior	\$38.00
Family <sup>12</sup>	\$85.00

This is a full-facility membership and it does include the use of other YMCA's.

**Fairmount Athletic Club**

Category	Down Payment	Monthly Rate
Individual	\$49.00	\$39.00
Couple	\$79.00	\$59.00

**The Factory Fitness + Sports**

Category	Start-up	Monthly Rate
Individual	\$115.00	\$12.99

<sup>12</sup> Includes 2 adults and their dependents living at the same address.



# OPERATIONS ANALYSIS

## Upper Merion Community Center Study



**Attendance Projections:** The following attendance projections are the basis for the revenue figures that were identified earlier in this report. The admission numbers are affected by the rates being charged, the facilities available for use and the competition within the service area. The figures are also based on the performance of other similar facilities in the area. These are averages only and the yearly figures are based on 355 days of operation.

<b>Yearly Paid Admissions</b>	<b>Description</b>	<b>Facility</b>
Daily	50 admissions/day	17,750
3 Month	765 sold annually	18,360
Annual	1,500 sold annually	156,000
<b>Total Yearly</b>		<b>192,110</b>
<b>Total Daily</b>		<b>541</b>

**NOTE:** The 2,265 three month/annual passes are based on selling to approximately 10% of the households in the Township (11,996 estimated in 2010) and 6% of the households in the Secondary Service Area (17,761 estimated in 2010). Three month passes are based on 24 admissions and annual passes on 104 admissions a year. Couple and family passes are counted as a single admission.

# OPERATIONS ANALYSIS

*Upper Merion Community Center Study*



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**Hours of Operation:** The projected hours of operation of the Upper Merion Community Center are as follows:

<b>Days</b>	<b>Hours</b>
Monday-Friday	5:00am-10:00pm
Saturday	8:00am-8:00pm
Sunday	8:00am-8:00pm
Hours per Week	109

Hours usually vary some with the season (longer hours in the winter, shorter during the summer), by programming needs, use patterns and special event considerations.



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## **Section V – Funding Analysis**

While it is recognized that the community center project will in all likelihood be primarily funded by Upper Merion Township, there are a number of other possible funding sources that should be investigated. Although this is not meant to be an exhaustive list it does indicate possible available funding sources. These include:

### **Capital Funding:**

***Upper Merion Township*** – It is anticipated that the primary source of capital dollars for the community center will be through the Township either by existing fund sources or a general obligation bond.

### **Possible Bond Scenarios**

Based on conversations with Township staff, these bond scenarios have been developed for the three project options based on the entire project cost being covered by the bond.

Heuser - \$27,300,000 x 4.25% bond rate for 25 years = \$1,794,010 annual payment.

Gold's Gym - \$28,100,000 x 4.25% bond rate for 25 years = \$2,113,680 annual payment.

Allendale - \$32,700,000 x 4.25% bond rate for 25 years = \$2,459,690 annual payment.

***Partnerships*** – Despite the fact that that a potential equity (primary) partner in the project has not been identified, there still is the possibility that one could be found. However it must be realized that there are limits on the types of partners that can established for this kind of project and capital dollars received from other organizations should not be expected to help fund the development of the center.

***Fundraising*** – A possible source of capital funding could come from a comprehensive fundraising campaign in the Upper Merion area. Contributions from local businesses, private individuals and social service organizations should be targeted. To maximize this form of funding a private fundraising consultant may be necessary. A goal of fundraising could be to fund between 10% and 15% of the capital cost of the project.

***Grants/foundations*** – There are a number of grants and/or foundations that are available for recreation and redevelopment projects. It is more difficult to fund active recreation facilities than parks and open space from these sources, but an effort should be made to acquire limited funding from these sources. Key aspects of the facility that should be targeted for grants are

serving youth, teens, seniors and families. Major funding from this source is unlikely but it never the less could provide some assistance to the project (probably less than 5%).

***Naming Rights and Sponsorships*** – Although not nearly as lucrative as for large stadiums and other similar facilities, the sale of naming rights and long term sponsorships could be a source of some capital funding as well. It may be necessary to hire a specialist in selling naming rights and sponsorships if this revenue source is to be maximized to its fullest potential. No lifetime naming rights should be sold only 20 year maximum rights should be possible. Determining the level of financial contribution necessary to gain a naming right will be crucial. This could mean a contribution for up to 25% of the total cost of the entire project for overall facility naming rights or 50% to 100% for individual spaces (specific rooms) within the center itself.

**Operations Funding:** It is not likely that there will be an operations subsidy that will need to be funded each year. However, a funding plan for a possible subsidy should be considered.

***Fees and Charges*** – The Upper Merion Community Center will need to adopt a reasonably aggressive fee structure for its use and services that ensures that those amenities that command a fee structure for use are maximized. Between 100% and 150% of the operations cost of the center should be covered by fees and charges generated by the center itself.

***Upper Merion Township*** – It is expected that the Township will be the primary funder of any future annual operating subsidy by utilizing tax dollars to help off-set operations costs.

***Partnerships*** – Any project partners who potentially would be strong users of the center should be contributing operational dollars to the facility through the fees charged for their use of the building.

***Grants*** – There are grants that are available for programs and services that serve the disadvantaged, youth, teens and seniors. It may be possible to acquire funding for specific programs from this source.

**Foundation:** It is highly recommended that a 501(c)3 foundation be established for the project (or an existing parks foundation utilized). This will provide a way to collect a variety of fundraising dollars as well as equity partner payments for the project. This may also make the project eligible for a broader range of grant dollars as well.

Any primary partners in the project may need to have a contractual requirement that they to help with funding of operations.



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### **Section VI - Project Recommendations**

The following section details specific recommendations for the Upper Merion Community Center project. Remarks are grouped by areas of interest.

**Programs and Facilities:** The design, image and quality of a recreation facility has a direct impact on its ability to attract and keep annual pass holders. Thought should be given to the building layout as it pertains to user control and access, during the final design phase of the project. A visible open design which highlights the different activity areas and encourages participation from the user as well as the non-user, is essential to generating member excitement and revenue. As much natural light as possible needs to be incorporated into the design while not compromising safety and promoting and maintaining energy efficiency in every way possible. The intent is to build a "smart building" that gives Upper Merion Township the most for its money and the user a sense of quality and value.

Weight/cardiovascular fitness area- The presence of a large space for fitness activities in the building is essential to developing a strong revenue stream for the facility. More revenue per square foot can be generated from this recreation component than any other indoor amenity. It also allows the center to have a higher rate structure due to the value such an amenity has in the market place.

Pool- No other amenity affects facility revenues and use as dramatically as a pool and as a result, Ballard\*King and Associates believes strongly that any aquatic/recreation center that is being built in most settings should include a recreationally oriented swimming pool as part of its facility components. While a competitive pool will serve more traditional aquatic needs in the community it is the leisure pool that will meet the broadest range of swimming interests. The idea of incorporating slides, current channels, fountains, zero depth entry and other water features into a pool's design has proved to be extremely popular for the drop-in user. Leisure pools appeal to the younger kids (who are the largest segment of the population that swims) and to families. These types of facilities are able to attract and draw larger crowds and people tend to come from a further distance and stay longer to utilize such pools. This all translates into more use and revenue. Of note is the fact that patrons seem willing to pay a higher admission fee for the use of a leisure amenity when it includes a pool (even if they are not a swimmer). The simple fact that there is a leisure pool in a community center will drive the use and ultimately the revenue in the other areas of the center. It is estimated that a leisure pool will increase revenues in non-aquatic areas by as much as 10%. Consistent use of the facility by families and young children is dependent in large part on this amenity. The sale of annual passes and especially family annual passes is also tied to the appeal of the leisure pool.

# PROJECT RECOMMENDATIONS

## *Upper Merion Community Center Study*



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Programs- The center should not be designed specifically to handle the once a year event or activity but should have the versatility to adapt to these needs within reason. Long term programming and facility needs of the community, businesses, and special interest groups should be identified and integrated into the operations plan for this facility.

The success of community based aquatic/recreation centers is dependent on developing a broad based appeal to the annual pass holders as well as the general public. The needs of youth, seniors, and families must be considered and their individual concerns and issues addressed. Programs that are intergenerational in nature and those that are specifically oriented towards certain population segments will both need to be developed. One of the top priorities should be the establishment of a Silver Sneakers program for seniors that will not only provide critical services but also a funding avenue for the program. The needs of the business community must also be considered if this market is to be developed.

Consideration should be given to contracting for certain programs or services, especially those that are very specialized in nature. Any contracted programs or services should require a payment of a percentage of the fees collected (at least 30%) back to the center and the township.

It is important to realize that the center must have a balance between program and drop-in use of the various components of the facility. The gym and weight/fitness areas are of particular concern. If these areas do not have substantial times set aside on a daily basis for drop-in use then revenues generated from annual passes will be in jeopardy.

**Budget and Fees:** The success of this project depends on a number of budget factors, which need special consideration. An operational philosophy must be developed and priorities for use must be clearly identified. The revenue figures contained in this document are based on the principal that the facility will have a strong 3 month, annual pass and program orientation. A goal of consistently covering over 100% of operational expenses with revenues should be attainable but it is highly unlikely that any substantial level of debt service can be covered. However, it should be realized that most public aquatic, sports, and fitness facilities have similar difficulties. Maximizing revenue production should be a primary goal. Care must be taken to make sure that a fees and charges policy is consistently followed for all users. No form of revenue production should be given away.

Capital replacement fund- A plan for funding a capital replacement program should be developed before the facility opens. The American Public Works Association recommends between 2% and 4% of replacement cost be budgeted annually for capital items. Costs for maintenance and contract services should be lower than the amount budgeted for the first year since most equipment will still be under warranty.

# PROJECT RECOMMENDATIONS

## *Upper Merion Community Center Study*



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Fees- The revenue projections were based on the concept of not having more than a 25% resident/non-resident fee differential. A non-resident fee that is more than 25% tends to exclude these individuals from participating in the facility or its programs. With the relatively small resident population base, non-residents need to be encouraged to utilize the facility to make it financially viable. With a resident/non-resident fee system, non-resident fees should be listed as the “regular fee” and the resident fee as the “resident discount fee”. It is estimated that 25% to 30% of all users could be non-residents. To adequately administer a resident/non-resident fee program a resident photo ID program needs to be put into effect. This requires a resident to buy a photo ID to speed identification and resident verification at the check-in counter. The costs and revenues of such a program have not been figured into the operations budget.

Fees paid for individual programs do not allow the user to utilize the center on a drop-in basis. The payment of the drop-in fee should allow the user access to all areas of the center that are open to drop-in use. There should not be separate fees for different portions of the building (such as the gym, track or weight room).

A senior discount fee schedule was developed for the center, but it should be considered as a marketing tool rather than a discount based on need. Another option is to offer a limited morning or daytime discount rate that would be available to anyone using the center during this slower period of the day. This would work much like a senior discount without having to label it as one. With the fee structure that has been proposed, it will be necessary to develop a scholarship program for those individuals that cannot afford the basic rates. Established criteria such as eligibility for the school lunch program should be utilized to determine need rather than spending the time and aggravation of developing and administering a new system. The corporate rate program should also be promoted and sold to local businesses in the area.

To promote the sale of annual passes it is absolutely essential that a system be set up that allows for the automatic withdrawal from the pass holder’s checking account of a monthly portion of the annual pass payment. Without this option it will be difficult to meet the projected sales of annual passes. In addition, charge cards need to be accepted for all programs and services offered by the township. A computerized registration process must also be introduced to speed registration transactions and improve annual pass management.

Annual pass benefits – With revenues from annual passes making up the greatest single source of revenues, selling the benefits will be critical. This includes free basic land and water based fitness classes and possibly free drop-in child care. Other options include an initial fitness assessment and 1-3 personal training sessions and a 15% discount on all fee based classes and services in the center.

# PROJECT RECOMMENDATIONS

## *Upper Merion Community Center Study*



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Pre-selling annual passes – Approximately 3 to 6 months before the facility opens there should be a program in place to begin the pre-sale of “charter passes”. A goal should be to pre-sell between 25% and 50% of all budgeted passes prior to opening the facility.

Marketing plan- A marketing plan for the facility as well as its programs and services is essential. This document should target specific markets, programs, facilities and user groups. It needs to be an active document that is utilized by the center supervisor to guide all marketing efforts. This plan should be updated yearly. Special emphasis must be placed on promoting not only annual passes but also programs to establish a strong revenue base. The business market should also be a major focus of the marketing effort as well. The annual pass rates for the center should be easily obtainable from the facility and the web site.

Another focus of the marketing plan could be the development of a comprehensive sponsorship program for the entire facility. This program could provide an additional revenue stream for the center.

Staffing- Staffing costs are the biggest single operating expense and alternative options need to be investigated if costs are to be significantly reduced. The use of volunteers, trading facility use for labor and other similar ideas, deserve consideration as methods to reduce staffing budgets. The pay rates for both part-time and full-time personnel were determined based on the need to attract well-qualified employees and minimize staff turnover rates. It is important to budget for an adequate level of staffing in all areas. One of the biggest mistakes in operations comes from understaffing a facility and then having to come back and add more help later. Maintenance staffing is of particular concern and is most often where cuts are made. Detailed job descriptions should be written for all staff and areas of responsibility need to be clearly defined. An adequate training fund is essential to a well-run facility. An emphasis needs to be placed on the importance of image and customer service in all training programs.

The key to opening a recreation facility and have it operate smoothly is hiring the necessary staff well in advance and having them well organized, properly trained and comfortable with the building’s features. They need to be ready to hit the ground running with policies and procedures in place, and a marketing and maintenance program under way. However, this will require the establishment of a start-up budget and funding in advance of user revenues.

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## **Section VII - Appendix**

Part-Time Staff Hours

Program Revenue Projections

Admission Revenue Projections

Site and Concept Plans



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**Part-Time Staff Hours:**

**Front Desk** - 2 scheduled to work any hours that the center is open plus 3 staff from 4 to 8 pm on weekdays and 1 to 6 pm on weekends. The two full-time Front Desk Supervisor positions will handle 80 hours of the front desk schedule (split between evenings and weekends).

**Gym Attendant**

Days	Time	Hours	Employees	Days	Total Hours/Week
Mon-Fri	4:00-9:00P	5	1	5	25
Sat & Sun	Noon-6:00P	6	1	2	12
<b>TOTAL</b>					<b>37</b>

**NOTE:** This position is 26 weeks only during the winter months.

**Weight/Cardio Room Attendant**

Days	Time	Hours	Employees	Days	Total Hours/Week
Mon-Fri	5:00-10:00A	5	2	5	50
	10:00A-4:00P	6	2	5	60
	4:00-10:00P	6	2	5	60
Saturday	8:00A-2:00P	6	2	1	12
	2:00-8:00P	6	2	1	12
Sunday	8:00A-2:00P	6	2	1	12
	2:00P-8:00P	5	2	1	12
<b>TOTAL</b>					<b>218</b>

**Custodian**

Days	Time	Hours	Employees	Days	Total Hours/Week
Mon-Fri	8:00A-4:00P	8	1	5	40
	4:00P-10:00P	6	1	5	30
Sat & Sun	7:00-11:00A	4	1	1	4
	11:00A-3:00P	4	1	1	4
	3:00-10:00P	7	1	1	7
<b>TOTAL</b>					<b>85</b>

**Child Watch Attendant**

Days	Time	Hours	Employees	Days	Total Hours/Week
Mon-Fri	8:00A-1:00P	5	2	5	50
	4:00-8:00P	4	2	5	40
Saturday	10:00A-4:00P	6	2	1	12
<b>TOTAL</b>					<b>102</b>

**Lifeguard Staffing**

Summer Season (June, July, August & Holidays, 15 wks)

Days	Time	Hours	Employees	Days	Total Hours/Week
Mon-Fri	5:00-9:00A	4	2	5	40
	9:00A-1:00P	4	2	5	40
	1:00-7:00P	6	5	5	150
	7:00-10:00P	3	4	5	60
Saturday	8:00-9:00A	1	2	1	2
	9:00A-1:00P	4	2	1	8
	1:00-6:00P	5	5	1	25
	6:00-8:00P	2	4	1	8
Sunday	8:00-9:00am	1	2	1	2
	9:00A-1:00P	4	2	1	8
	1:00-6:00P	5	5	1	25
	6:00P-8:00P	2	4	1	8
<b>TOTAL</b>					<b>376</b>

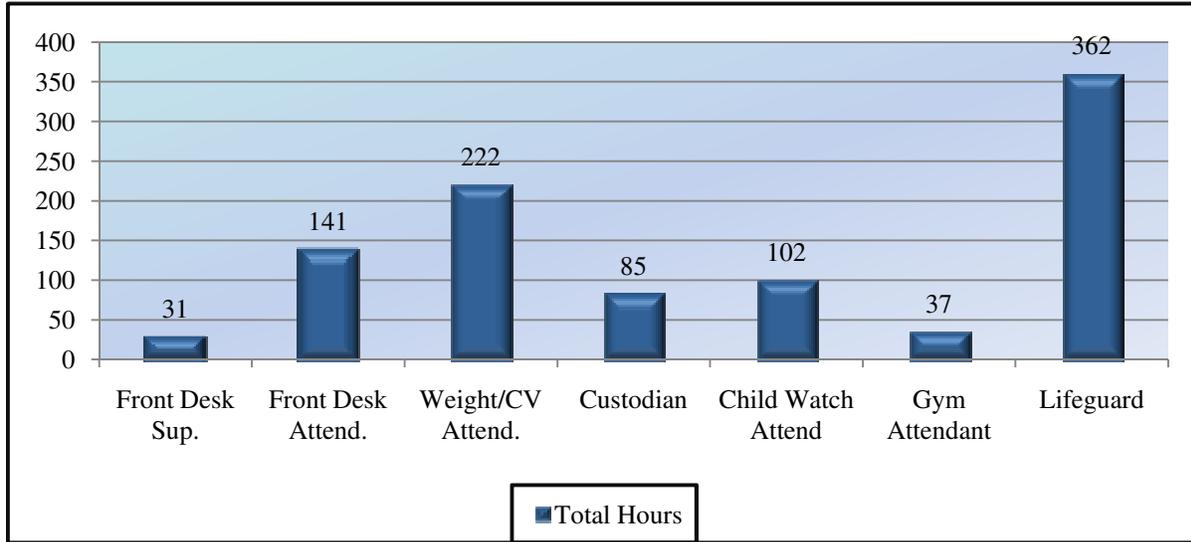
Fall, Winter, & Spring Seasons (September – May, 37wks)

Days	Time	Hours	Employees	Days	Total Hours/Week
Mon-Fri	5:00-8:00A	3	2	5	30
	8:00-11:30A	3.5	2	5	35
	11:30A-1:00P	1.5	2	5	15
	1:00-3:00P	2	2	5	20
	3:00-8:00P	5	5	5	125
Saturday	8:00-10:00P	2	4	5	40
	8:00-9:00A	1	2	1	2
	9:00A-1:00P	4	2	1	8
	1:00-6:00P	5	5	1	25
Sunday	6:00-8:00P	2	4	1	8
	8:00-9:00am	1	2	1	2
	9:00A-1:00P	4	2	1	8
	1:00P-6:00P	5	5	1	25
	6:00-8:00P	2	4	1	8
<b>TOTAL</b>					<b>351</b>

**NOTE:** This schedule is based on a guard rotation concept and on utilizing the Head Guards in the rotation schedule (approximately 80 hrs. a week additional). Based on the pool's basic configuration, schedule and estimated use patterns, this level of lifeguard staffing will be necessary to ensure adequate protection for swimmers. This is an estimate of anticipated guard hours only and actual needs could vary depending on the final pool design, actual use patterns, and hours of operation.

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### Recommended Hours per Week for Successful Operation



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## Aquatics Program Staffing

### *Swim Lessons*

Season	Staff Rate/Class	Classes/Day	Days	Weeks	Total
Summer	\$5.00	24	4	10	\$4,800
Spring/Fall	\$5.00	12	2	16	\$1,920
Winter	\$5.00	10	2	8	\$800
<b>TOTAL</b>					<b>\$7,520</b>

**Note:** Instructors are paid \$10/hour classes are 30 minutes in length.

### *Water Aerobics*

Season	Staff Rate/Class	Classes/Week	Weeks	Total
Summer	\$25.00	18	14	\$6,300
Spring/Fall	\$25.00	15	26	\$9,750
Winter	\$25.00	15	12	\$4,500
<b>TOTAL</b>				<b>\$20,550</b>

### *Private Swim Lessons*

Lessons/Week	Staff Rate/Lesson	Weeks	Total
6	\$15.00	45	\$4,050
<b>TOTAL</b>			<b>\$4,050</b>

### *Lifeguard/WSI Training*

Staff	Staff Rate/Class	Hours/Class	Sessions	Total
1	\$15.00	31	3	\$1,395
<b>TOTAL</b>				<b>\$1,395</b>

### *Therapy Classes*

Staff	Staff Rate/Class	Classes/Week	Weeks	Total
1	\$25.00	6	40	\$6,000
<b>TOTAL</b>				<b>\$6,000</b>

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*Miscellaneous*

Staff	Staff Rate/Class	Classes/Week	Weeks	Total
1	\$15.00	6	50	\$4,500
<b>TOTAL</b>				<b>\$4,500</b>

**Aquatic Program Staffing**

Category	
Swim Lessons	\$7,520
Water Aerobics	\$20,550
Private Swim Lessons	\$4,050
Lifeguard/WSI Training	\$1,395
Therapy Classes	\$6,000
Miscellaneous	\$4,500
<b>TOTAL</b>	<b>\$44,015</b>

**General Programs**

*Adult Leagues (basketball & volleyball) –2 ten week seasons a year*

League	Position	Staff	Rate/Game	Game/Wk	Weeks	Total
Basketball	Officials	2	\$15.00	6	20	\$3,600
	Scorer	1	\$8.00	6	20	\$960
Volleyball	Off/Scorer	1	\$15.00	6	20	\$1,800
<b>TOTAL</b>						<b>\$6,360</b>

*Youth Leagues (indoor soccer) –2 ten week seasons a year*

League	Position	Staff	Rate/Game	Game/Wk	Weeks	Total
Soccer	Officials	2	\$15.00	9	20	\$5,400
	Scorer	1	\$8.00	9	20	\$1,440
<b>TOTAL</b>						<b>\$6,840</b>

*Youth Sports Camps*

League	Position	Staff	Rate/Hr.	Number	Hours	Total
Basketball	Coaches	2	\$15.00	2	16	\$960
Volleyball	Coaches	2	\$15.00	2	16	\$960
Other	Coaches	2	\$15.00	4	16	\$1,920
<b>TOTAL</b>						<b>\$3,840</b>

*Fitness*

Day	Staff	Rate/Class	Classes/Week	Weeks	Total
Mon, Wed, Fri	1	\$25.00	21	52	\$27,300
Tue, Thu	1	\$25.00	14	52	\$18,200
Saturday	1	\$25.00	4	52	\$5,200
<b>TOTAL</b>					<b>\$50,700</b>

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*Strength Training*

Staff	Rate/Class	Classes/Week	Weeks	Total
1	\$25.00	6	52	\$7,800
<b>TOTAL</b>				<b>\$7,800</b>

*Personal Trainer*

Staff	Rate/Session	Sessions/Week	Weeks	Total
1	\$35.00	10	52	\$18,200
<b>TOTAL</b>				<b>\$18,200</b>

*Youth/Teen Activities*

Staff	Staff Rate/Class	Classes/Week	Weeks	Total
1	\$15.00	12	36	\$6,480
<b>TOTAL</b>				<b>\$6,480</b>

*Senior Activities*

Staff	Staff Rate/Class	Classes/Week	Weeks	Total
1	\$15.00	6	36	\$3,240
<b>TOTAL</b>				<b>\$3,240</b>

*Birthday Parties*

Staff	Staff Rate/Party	Parties/Week	Weeks	Total
1	\$15.00	10	52	\$7,800
<b>TOTAL</b>				<b>\$7,800</b>

**General Interest**

Staff	Staff Rate/Class	Classes/Week	Weeks	Total
1	\$15.00	6	36	\$3,240
<b>TOTAL</b>				<b>\$3,240</b>

**Miscellaneous** (dance, martial arts, etc.)

Staff	Staff Rate/Class	Classes/Week	Weeks	Total
1	\$15.00	9	36	\$4,860
<b>TOTAL</b>				<b>\$4,860</b>

**General Program Staffing**

Category	
Adult Leagues	\$6,360
Youth Leagues	\$6,840
Youth Camps	\$3,840
Fitness Classes	\$50,700
Strength Training	\$7,800
Personal Training	\$18,200
Youth/Teen Activities	\$6,480
Senior Activities	\$3,240
Birthday Parties	\$7,800
General Interest/Arts & Crafts	\$3,240
Miscellaneous	\$4,860
<b>TOTAL</b>	<b>\$119,360</b>

**NOTE:** Some programs and classes will be on a contractual basis with the center, where the facility will take a percentage of the revenues charged and collected. These programs have not been shown in this budget as a result.

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## Program Revenue Estimates

### Aquatics

#### Swim Lessons

Title	Classes	Fee	Sessions/ Weeks	Total Revenue
<i>Summer</i>	24 classes/4 per class	\$55.00	5 sessions	\$26,400
<i>Spring/Fall</i>	12 classes/4 per class	\$55.00	2 sessions	\$5,280
<i>Winter</i>	10 classes/4 per class	\$55.00	1 session	\$2,200
<i>Private Lessons</i>	6 classes/wk	\$30.00/cl.	45 weeks	\$8,100
TOTAL				\$41,980

#### Water Aerobics

Title	Classes	Fee	Sessions/ Weeks	Total Revenue
<i>Summer</i>	18 classes/3 per class	\$10.00/cl.	14 weeks	\$7,560
<i>Spring/Fall</i>	15 classes/3 per class	\$10.00/cl.	26 weeks	\$11,700
<i>Winter</i>	15 classes/3 per class	\$10.00/cl.	12 weeks	\$5,400
TOTAL				\$24,660

#### Other

Title	Classes	Fee	Sessions/ Weeks	Total Revenue
<i>Lifeguard/WSI</i>	1 class/10 per class	\$125.00	3 sessions	\$3,750
<i>Therapy</i>	6 classes/5 per class	\$10.00/cl.	40 weeks	\$12,000
<i>Misc.</i>	6 classes/5 per class	\$7.00/cl.	50 weeks	\$10,500
TOTAL				\$26,250

**Aquatics Program Revenue** **\$92,890**

**Non-Resident (30% of attendees x 25%)** **\$6,967**

**Total Aquatics Program Revenue** **\$99,857**

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## General

### Adult Leagues

Title	Teams	Fee	Seasons	Total Revenue
<i>Basketball</i>	12 teams	\$600.00	2 seasons	\$14,400
<i>Volleyball</i>	12 teams	\$500.00	2 seasons	\$12,000
TOTAL				\$26,400

### Youth Leagues

Title	Teams	Players	Fee	Seasons	Total Revenue
<i>Soccer</i>	18 teams	10/team	\$65.00	2 seasons	\$23,400
TOTAL					\$46,800

### Youth Sports Camps

Title	Classes	Fee	Camps	Total Revenue
<i>Basketball</i>	20 kids	\$100.00	2 camps	\$4,000
<i>Volleyball</i>	20 kids	\$100.00	2 camps	\$4,000
<i>Other</i>	20 kids	\$100.00	4 camps	\$8,000
TOTAL				\$16,000

### Fitness

Title	Classes	Fee	Weeks	Total Revenue
<i>Fitness Classes</i>	39 classes/3 per class	\$10.00/cl.	52 weeks	\$60,840
<i>Strength Training</i>	6 classes/3 per class	\$10.00/cl.	52 weeks	\$9,360
<i>Personal Training</i>	10 sessions	\$50.00	52 weeks	\$26,000
TOTAL				\$96,200

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Other

<b>Title</b>	<b>Classes</b>	<b>Fee</b>	<b>Sessions/ Weeks</b>	<b>Total Revenue</b>
<i>Youth/Teen</i>	12 classes/8 per class	\$50.00/sess.	4 sessions	\$19,200
<i>Senior Activities</i>	6 classes/8 per class	\$25.00/sess.	4 sessions	\$4,800
<i>Birthday Parties</i>	10 per week	\$250/pty.	52 weeks	\$130,000
<i>General Interest</i>	6 classes/8 per class	\$50.00/sess.	4 sessions	\$9,600
<i>Misc.</i>	9 classes/5 per class	\$75.00/sess.	4 sessions	\$13,500
TOTAL				\$177,100

<b>General Program Revenue</b>	<b>\$362,500</b>
<b>Non-Resident (30% of attendees x 25%)</b>	<b>\$27,188</b>
<b>Total General Program Revenue</b>	<b>\$389,688</b>

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## Admission Revenue Worksheet:

### Daily

Category	Fee	# Per Day	Revenue	Days	Total
Adult	\$10.00	20	\$200		
Youth	\$8.00	15	\$120		
Senior	\$8.00	15	\$120		
		50	\$440	355	\$156,200
Non-Residents	30% of total x 25% fee increase				\$11,715
<b>TOTAL</b>					<b>\$167,915</b>

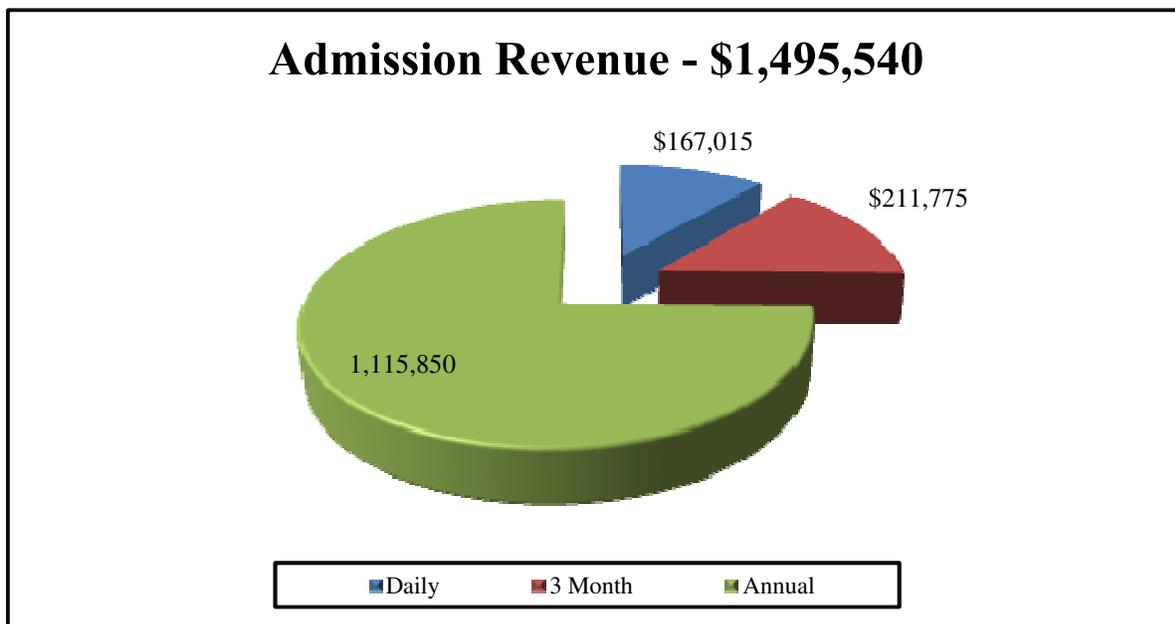
### 3 Month

Category	Fee	# Sold	Revenue
Adult	\$150	75	\$11,250
Adult Couple	\$225	100	\$22,500
Youth	\$110	20	\$2,200
Senior	\$110	50	\$5,500
Senior Couple	\$165	70	\$11,550
Family	\$320	450	\$144,000
<b>TOTAL</b>		765	\$197,000
Non-Residents	30% of pass holders x 25% increase		\$14,775
<b>TOTAL</b>			<b>\$211,775</b>

**Annual Passes**

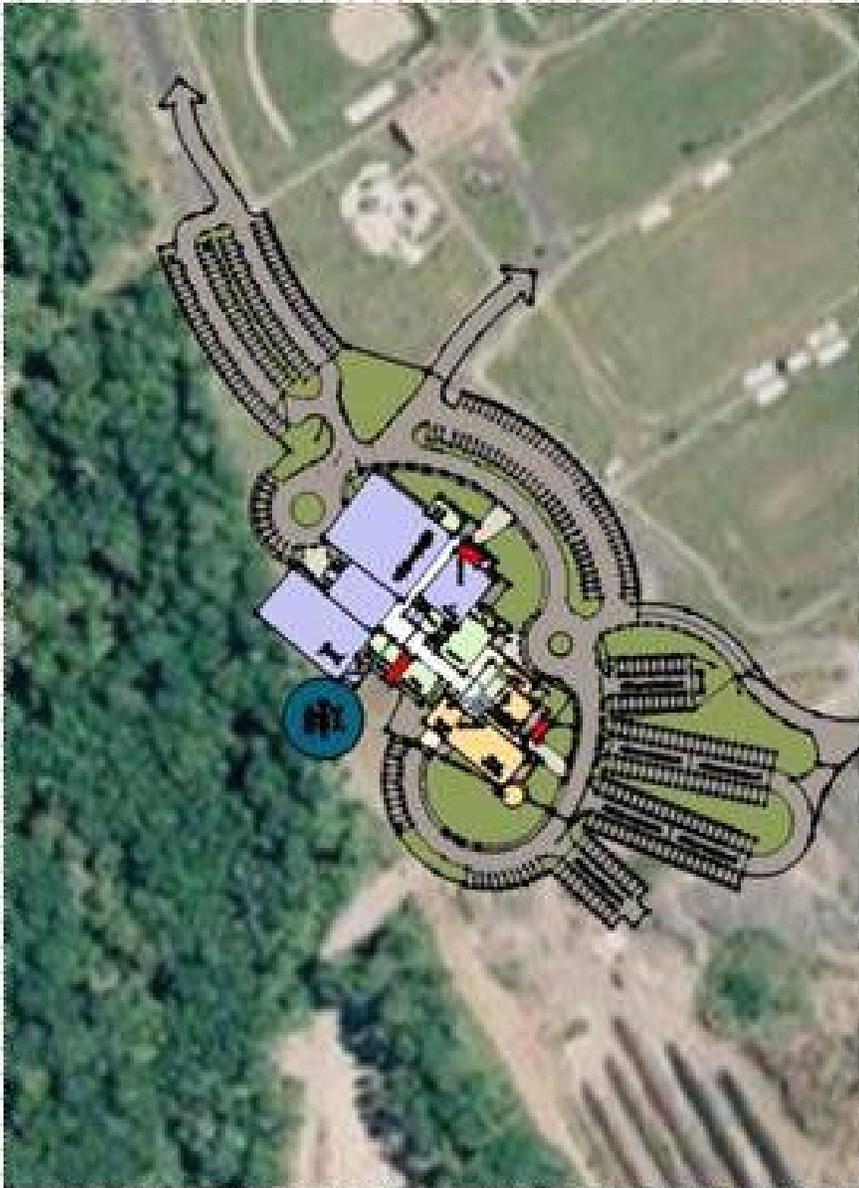
Category	Fee	# Sold	Revenue
Adult	\$395	150	\$59,250
Adult Couple	\$595	200	\$119,000
Youth	\$295	10	\$2,950
Senior	\$295	100	\$29,500
Senior Couple	\$445	140	\$62,300
Family	\$850	900	\$765,000
<b>TOTAL</b>		1,500	\$1,038,000
Non-Residents	30% of pass holders x 25% increase		\$77,85
<b>TOTAL</b>			<b>\$1,115,850</b>

**Revenue Summary**



**NOTE:** This work sheet was used to project possible revenue sources and amounts. These figures are estimates only, based on basic market information and should not be considered as guaranteed absolutes. This information should be utilized as a representative revenue scenario only and to provide possible revenue target ranges.

HEUSER PARK. site concept plan



KIMMEL BOGRETTE



HEUSER PARK. main floor plan



OFFICIAL SEAL





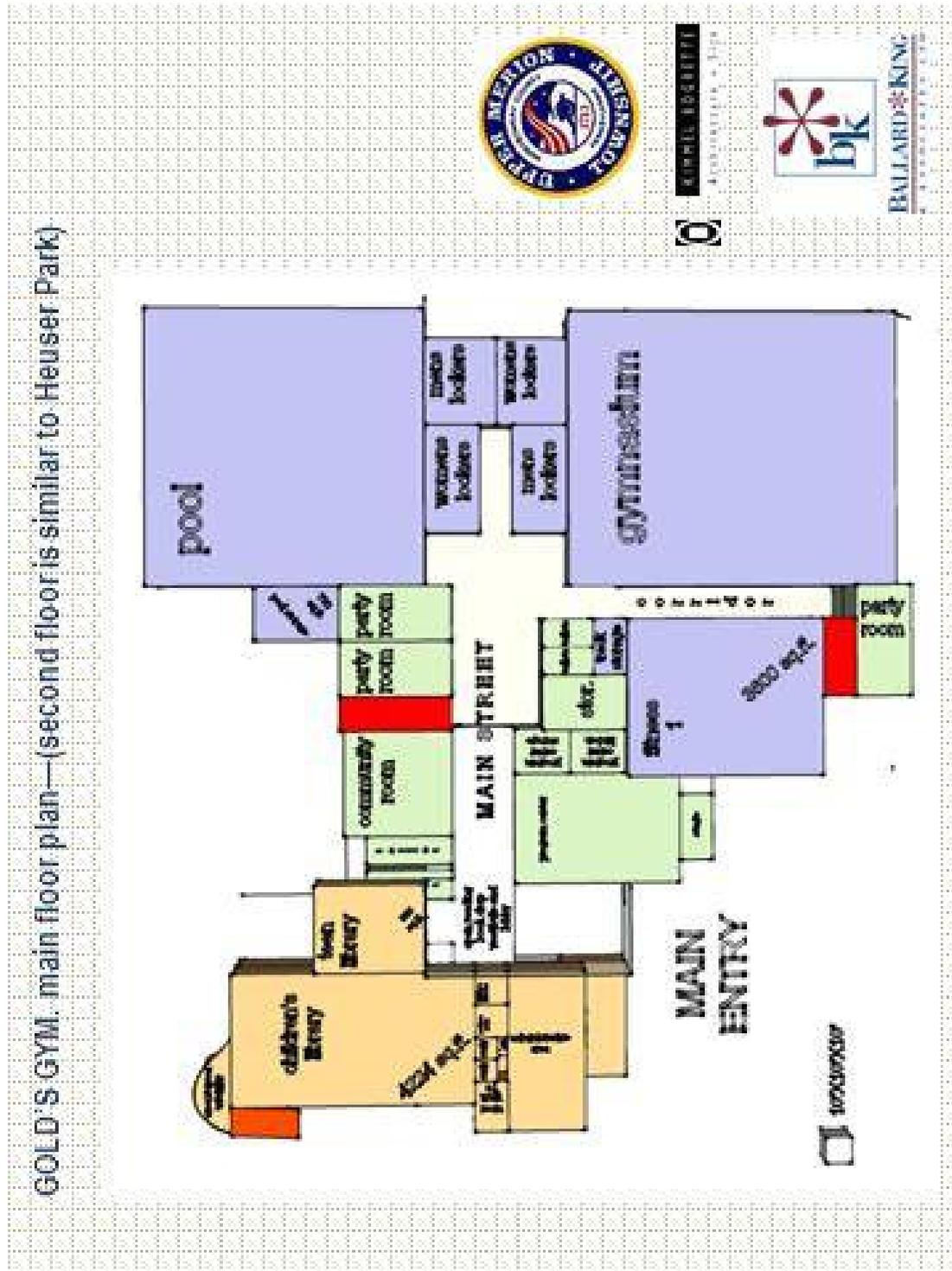
GOLD'S GYM. Site concept plan



OLYMPIC PARTNER



GOLD'S GYM. main floor plan—(second floor is similar to Heuser Park)



KIMMEL BOGRETTE  
Architecture + Site



BALLARD KING  
& ASSOCIATES LTD



ALLENDALE: site concept plan



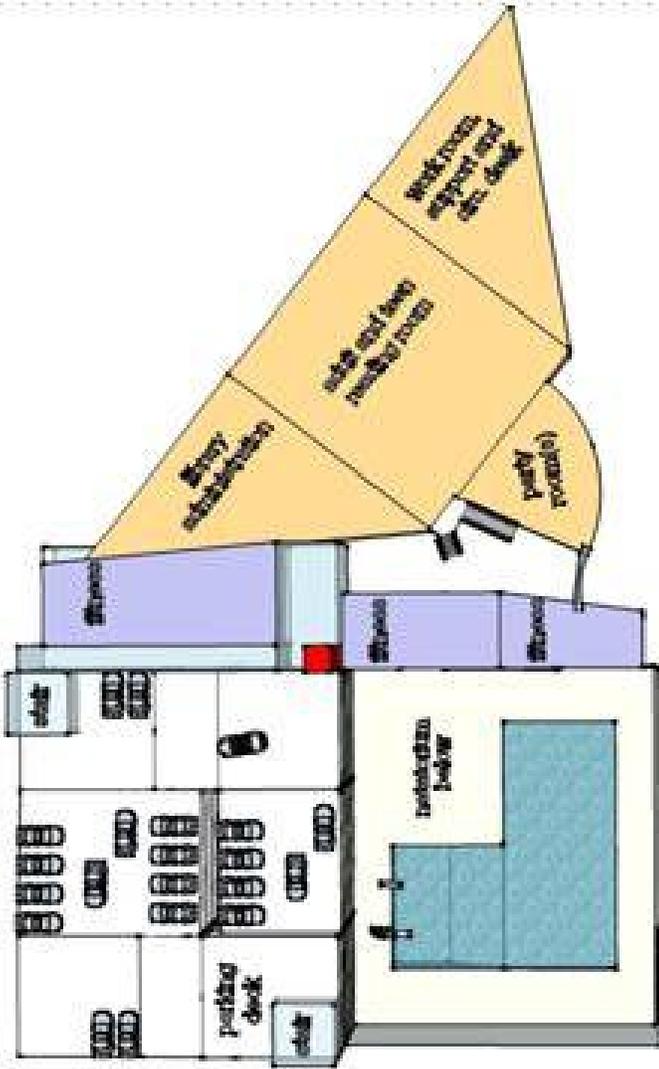
ALLENDALE main floor plan



ALLENDALE



ALLEDALE second floor plan



second floor plan



LEONIE BEAUCHIE



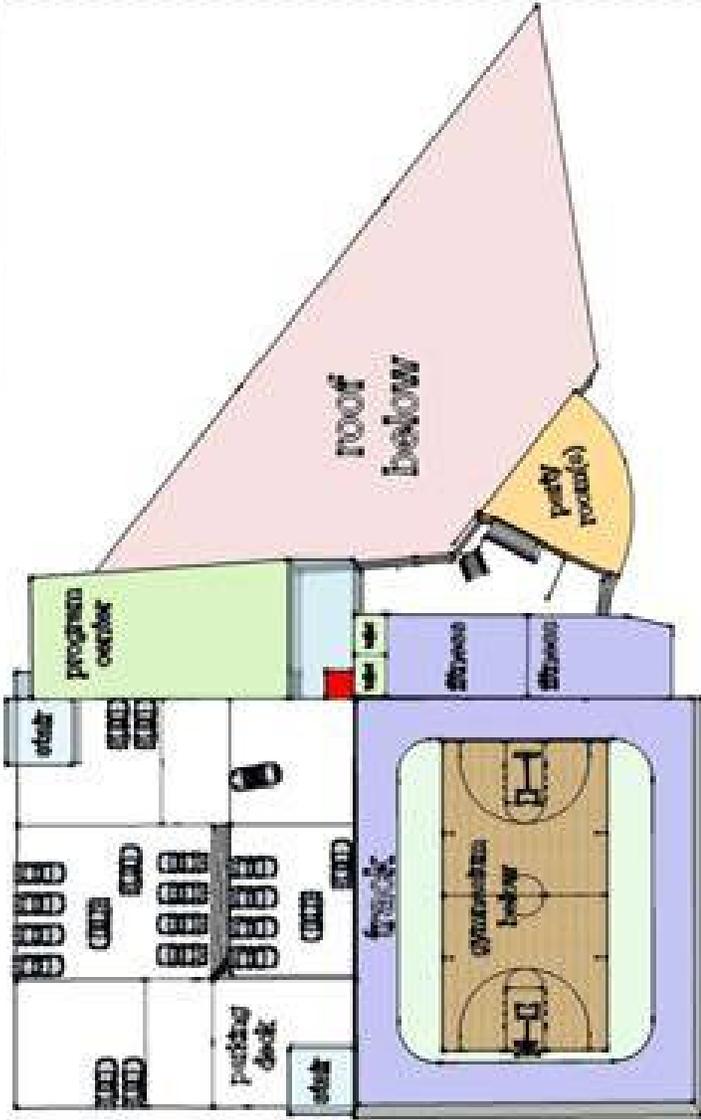
ALLENDALE: third floor plan



LEWIS BRUNER



ALLENDALE fourth floor plan



ARCHITECT



BALLARD KING & ASSOCIATES



ALLENDALE: transparent axonometric

