Message from the Upper St. Clair Board of Commissioners

The attached document is a Feasibility Study for the development of a community recreation and aquatic center. It is *not* intended to be a final proposal.

The Comprehensive Plan for Upper St. Clair notes the lack of a community center. This need was also identified by the citizens who participated in the development of the Master Plan for Boyce Mayview Park. Two years ago the Board of Commissioners initiated a project to respond to these needs. After reviewing the Comprehensive Plan and citizen surveys, the Commissioners undertook to determine how similar communities satisfy the need for a community center. Many communities similar to ours meet this need with a community center that provides meeting spaces, health & wellness programs, and fitness equipment, as well as aquatic and indoor sports facilities.

To gain a greater understanding of the community center concept, the Board of Commissioners: (1) Engaged Ballard*King and Associates to provide professional advice; and (2) Invited citizens who represent different constituent groups in Upper St. Clair to form the Community Recreation Center Ad Hoc Advisory Group.

After months of field trips, research, and discussions with their constituent groups, the Ad Hoc Group provided their recommendations to the Commissioners on October 31, 2005. Their report emphasized that a community center would offer significant benefits to the residents of Upper St. Clair and encouraged moving forward.

The community center concept developed by Ballard*King attempts to balance recreational needs with the need for a community center to cover many of its costs through user fees. The elements that Ballard*King, in its expert opinion, advises would work well in our market include (see pp. 63-65):

- **Indoor Aquatic Center** (p. 63) including a free form leisure pool, slides, interactive play feature, lazy river and zero depth entry.
- **Outdoor Aquatic Center** (p. 65) including a 6 lane lap pool, leisure pool with large zero depth entry, 2 slide tower, lazy river and interactive play features.
- **Gymnasium** (13,000 sq. ft.) divisible into 2 gym areas.
- **Running/Jogging Track**
- **Weight/Cardio Space**
- **Fitness Rooms**
- **Multipurpose/Party Rooms/Kitchen**
- **Drop-in Childcare Area**
- **Support Spaces** (locker rooms, lounges, etc.)

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Upper St. Clair

Several optional spaces, including an indoor competitive pool, were also examined by Ballard*King but were not included in the recommended community center due to low cost recovery opportunities (see pp. 65-66). The Commissioners may explore additional funding options for these spaces.

While the community center recommended by Ballard*King demonstrates the capacity to recover all *operational* costs through user fees, the bulk of *construction* costs estimated between $21 and $27 million would require subsidy, alternate sources of revenue, and/or significant partnerships with other entities. Clearly this is an issue of significant concern and will require additional discussion and exploration before a final proposal is prepared for the Fall referendum.

The Commissioners recognize that this is a major project for Upper St. Clair and are committed to full and intensive public discussion as the community moves forward to comprehensively meet the needs of all citizens for community and recreational activities in a fiscally responsible manner. Comments on this feasibility study are welcome and should be directed to the office of the Township Manager.

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1788

Upper St. Clair

Community Recreation Center and Aquatic Center Feasibility Study

Final Draft Report

BALLARD*KING
& ASSOCIATES

With

ARCHITECTS

March 2006

Township of Upper St. Clair Community Recreation Center and Aquatic Center Feasibility Study

Final Draft Report

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Section I - Demographic Summary and Market Analysis

In an attempt to determine the economic feasibility of building a proposed community recreation center/wellness center and outdoor aquatic center in the Township of Upper St. Clair, Pennsylvania, a market analysis that looks at the demographic realities of the area and reviews the existing indoor recreation, fitness and sports facilities, as well as outdoor aquatic centers has been undertaken.

The following is a summary of the basic demographic characteristics of the greater Upper St. Clair area, a comparison with basic recreation and leisure participation standards as produced by the National Sporting Goods Association and the National Endowment for the Arts.

Service Area: While the focus of the planned indoor center and outdoor aquatic center will be to serve the residents of the Township of Upper St. Clair, it is normal for most recreation facilities to have a primary service area that is different than just the jurisdictional boundaries. As a result, a primary service area for both facilities has been defined as a circle that includes all of the Township of Upper St. Clair, a small portion of Scott and Collier Township to the north, a significant portion of South Fayette to the west, a small piece of Cecil and Peters Township to the south and a small piece of Bethel Park to the east. A primary service area is usually defined by the distance people will travel on a regular basis (a minimum of once a week) to utilize a recreation, sports or fitness facility or its programs. Use by individuals outside of the primary service area will be limited to special facilities or special events (tournaments, swim meets, etc.) or visitors to the area. A larger secondary service area has been determined as an area that will draw some possible users to a center on at least an occasional basis. This secondary service area is a circle that is larger than the primary service area and basically includes all of the following townships, Upper St. Clair, Baldwin, Scott, Collier, South Fayette, Cecil, Peters and the municipalities of Bethel Park, and Mt. Lebanon. It will be difficult to draw users from the far reaches of the secondary service area due to the distance.

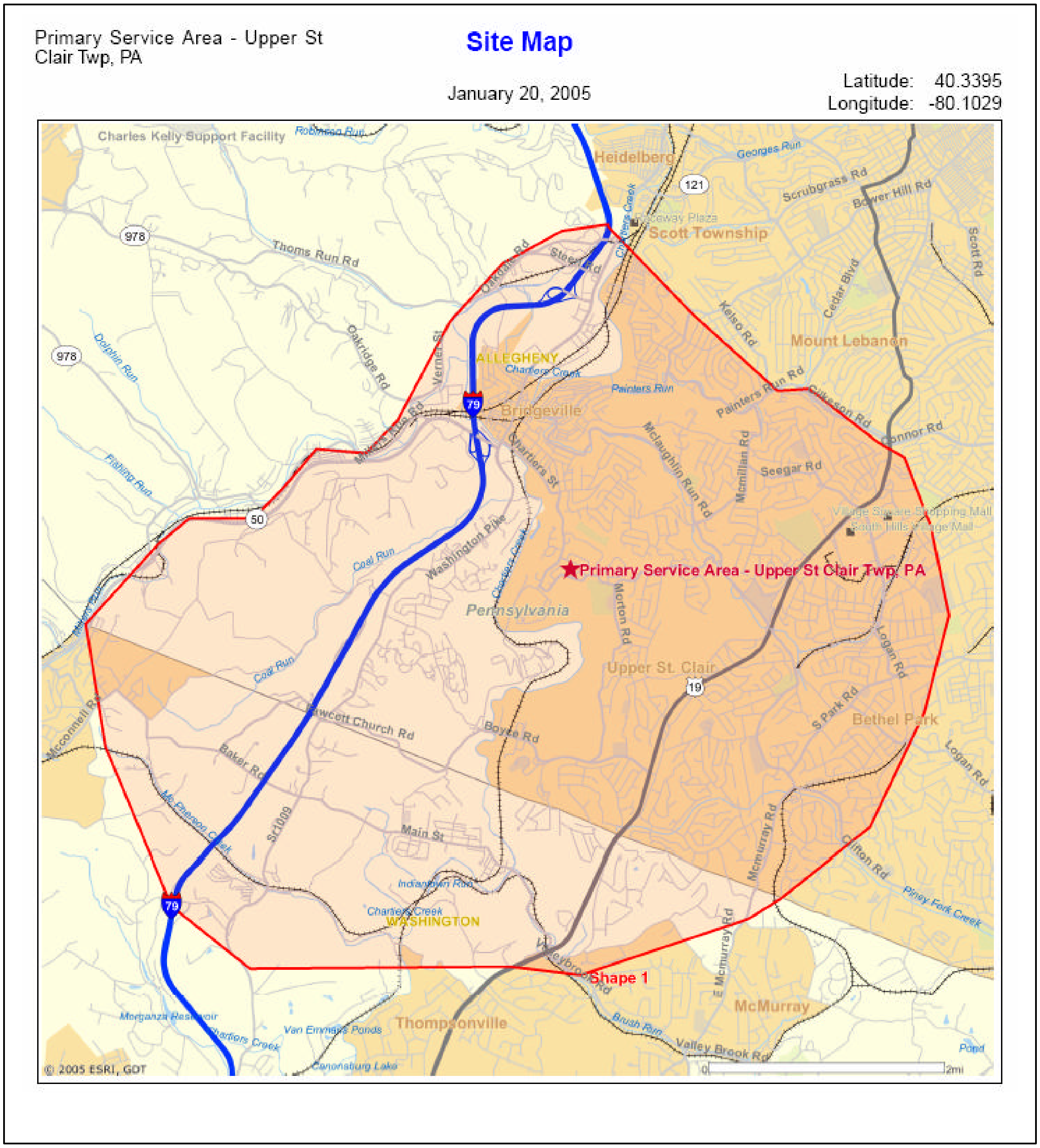
Primary service areas can vary in size with the types of components that are included in a facility and the orientation of the center. A center with an indoor leisure pool and other active elements (weight cardiovascular equipment area, gym, track, etc.) will generally have a larger primary service area than a more passively oriented facility. Specialized facilities such as an indoor ice rink, sports medicine clinic, or a sports fieldhouse will have even larger service areas that make them more of a regional destination. A center that offers unique services and specialized activities can also command a larger service area. Outdoor aquatic centers that have significant leisure amenities (slides, zero depth entry, play structures and concessions) can expand their market draw as well.

A 10 to 15 minute service area is not uncommon for recreation, aquatic and fitness facilities in an urban environment. The travel distance to the center of Upper St. Clair from most of the designated primary service area generally supports these numbers. There are currently a significant number of sports, recreation and wellness centers in the area which will potentially impact the market for an Upper St. Clair facility. There are also a large number of outdoor pools and swim clubs as well.

Service Area Population: The population of the service areas are as follows:

	2000 Census	2004 Est.	2009 Proj.
Township of Upper St. Clair	20,053	19,691	19,180
Primary Service Area	54,176	54,644	54,083
Secondary Service Area	236,563	238,023	235,920

Source - U.S. Census Bureau and ESRI. The demographic statistics for the primary service area will be utilized for this report with references to the secondary service area.


Primary Service Area - Upper St Clair Twp, PA
Site Map
January 20, 2005
Latitude: 40.3395
Longitude: -80.1029
Charles Kelly Support Facility
Heidelberg
Scott Township
Mount Lebanon
ALLEGHENY
Bridgeville
Primary Service Area - Upper St Clair Twp, PA
Pennsylvania
Upper St. Clair
Bethel Park
WASHINGTON
Shape 1
Thompsonville
McMurray
Thoms Run Rd
Oakridge Rd
Washington Pike
Fawcett Church Rd
Boyce Rd
Baker Rd
Main St
Morton Rd
Logan Rd
Mcmurray Rd
Valley Brook Rd
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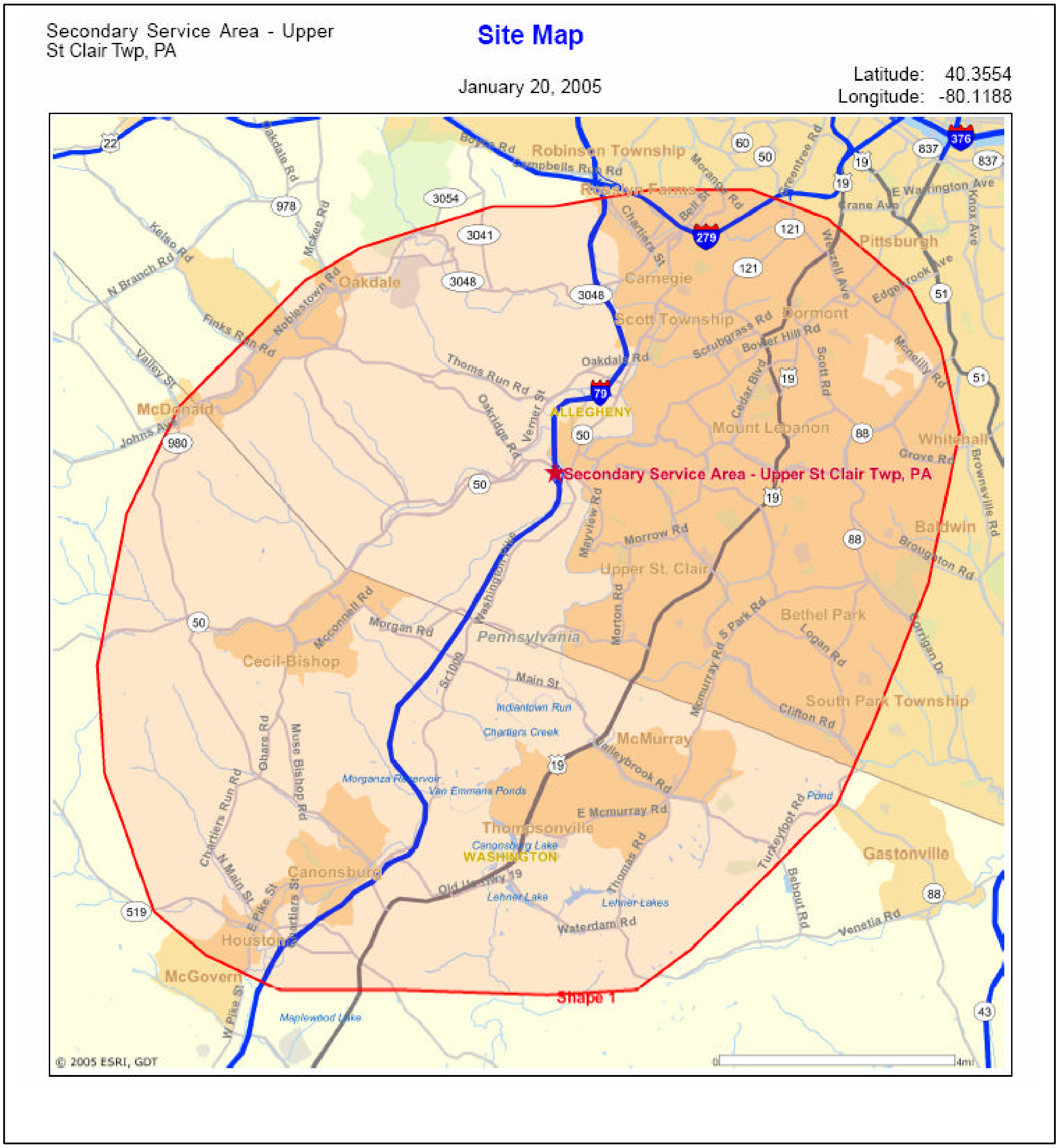
Secondary Service Area - Upper St Clair Twp, PA
Site Map
January 20, 2005
Latitude: 40.3554
Longitude: -80.1188
Secondary Service Area - Upper St Clair Twp, PA
Robinson Township
Carnegie
Scott Township
Pittsburgh
Dormont
Mount Lebanon
Whitehall
Baldwin
Upper St. Clair
Bethel Park
South Park Township
McMurray
Thompsonville
Canonsburg
Houston
McGovern
Cecil-Bishop
Oakdale
McDonald
Gastonville
ALLEGHENY
WASHINGTON
Pennsylvania
Shape 1
© 2005 ESRI, GDT
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Population Distribution by Age: Utilizing census information from the Upper St. Clair Primary Service Area the following comparisons are possible.

Primary Service Area - from 2004 ESRI census estimate

Table- A

Ages	Pop.	% of Tot.	Nat. Pop.	Diff.
-5	3,072	5.6%	6.8%	-1.2%
5-17	9,572	17.6%	18.0%	-.4%
18-24	3,376	6.2%	10.2%	-4.0%
25-44	12,716	23.3%	28.5%	-5.2%
45-54	9,075	16.6%	14.0%	+2.6%
55-64	6,413	11.7%	9.8%	+1.9%
65+	10,421	19.1%	12.5%	+6.6%

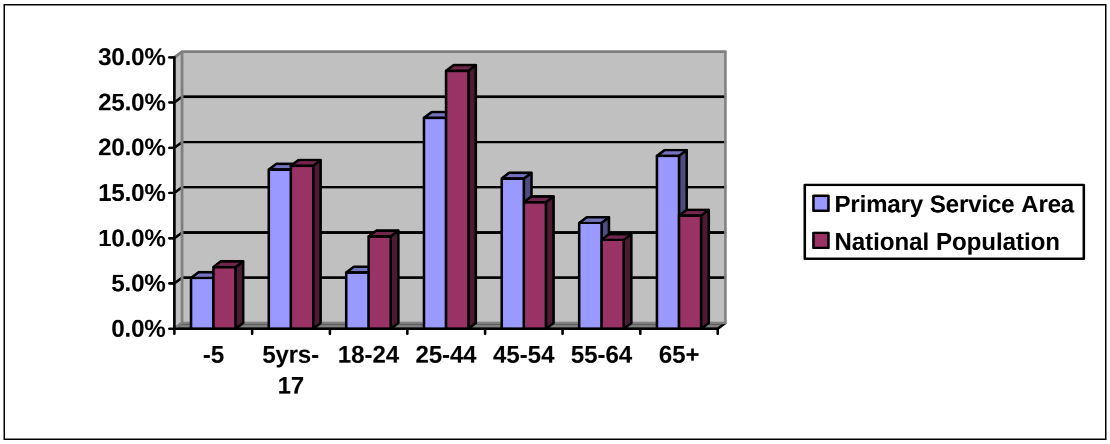
Population- 2004 census estimate in the different age groups in the service area.

% of Total- Percentage of the service area population in the age group.

National Population- Percentage of the national population in the age group.

Difference- Percentage difference between the service area population and the national population.

Chart- A



The demographic makeup of the Upper St. Clair primary service area, when compared to the characteristics of the national population, indicates that they are considerably different, with smaller youth and adult numbers and a larger middle age and senior population than the national numbers. Overall, the population is considerably older than the national numbers and indicates a smaller family market. This is further indicated by the fact that only 41.8% households have children under the age of 18.

When the demographics for the primary service area are compared with those from the secondary service area there are very few differences. The young adults and adult age groups have a slightly higher percentage and the middle aged adult and senior age categories have a slightly lower percentage. Overall the population is just a little younger than the primary service area.

Population Distribution Comparison by Age: Utilizing census information from the primary service area, the following comparisons are possible.

Upper St. Clair Primary Service Area - from census information and ESRI.

Table- B

Ages	2000 Pop.	2004 Pop.	2009 Pop.	% Change
-5	3,156	3,072	2,922	-7.4%
5-17	9,753	9,572	9,234	-5.3%
18-24	2,471	3,376	3,855	+56.0%
25-44	14,506	12,716	10,812	-25.5%
45-54	8,531	9,075	9,277	+8.7%
55-64	5,458	6,413	7,413	+35.8%
65+	10,302	10,421	10,571	+2.6%

Chart- B

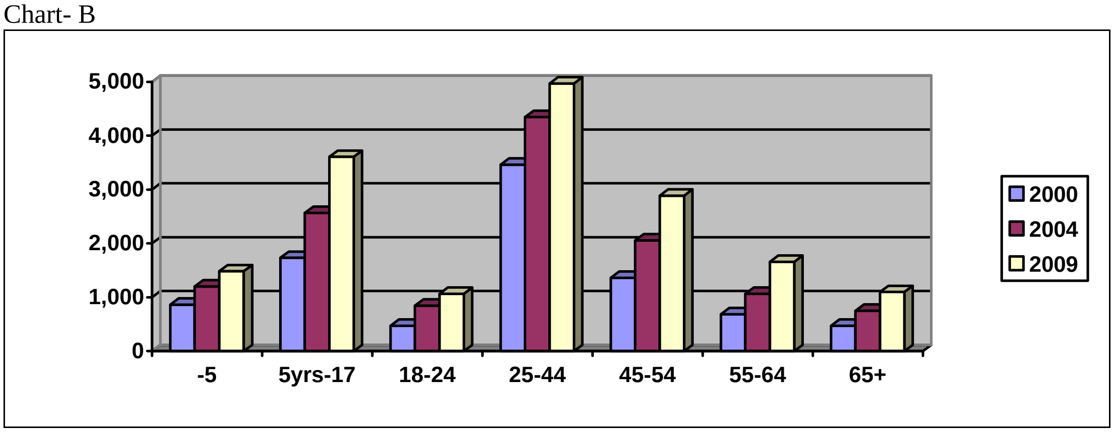


Table-B looks at the growth or decline in age group numbers from the 2000 census until the year 2009. It is projected that the youth age categories will see a decline as will the adult age category. On the other side the young adult, middle aged and senior population will see significant increases. It 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 30% in the 45 plus age groupings in communities, which are stable in their population numbers. The big increases in the young adult population are relatively unusual and indicate the presence of aging families with older children and older parents.

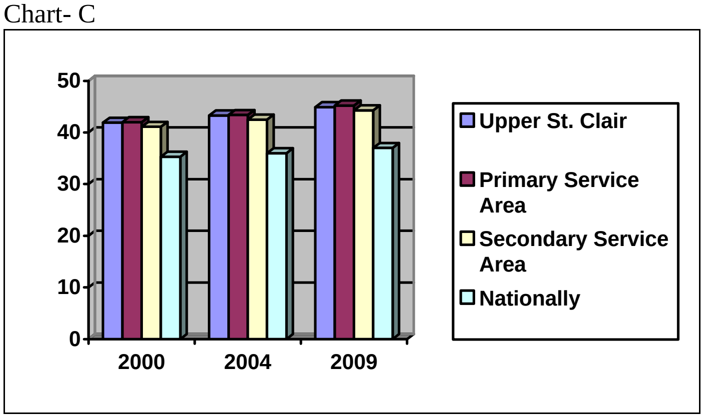
Once again when the statistics for the primary service are compared to secondary service area there are very few differences. The secondary service area population is expected to show declines in the same age groups and growth in similar age categories as well.

Next, the median age and household income levels are compared with the national numbers. Both of these factors are primary determiners of participation in sports and recreation activities (see Table-C). 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.

Median Age:

	2000 Census	2004 Est.	2009 Proj.
Upper St. Clair	41.9	43.3	44.9
Primary Service Area	42.0	43.4	45.2
Secondary Service Area	41.1	42.5	44.3
Nationally	35.3	36.0	37.0

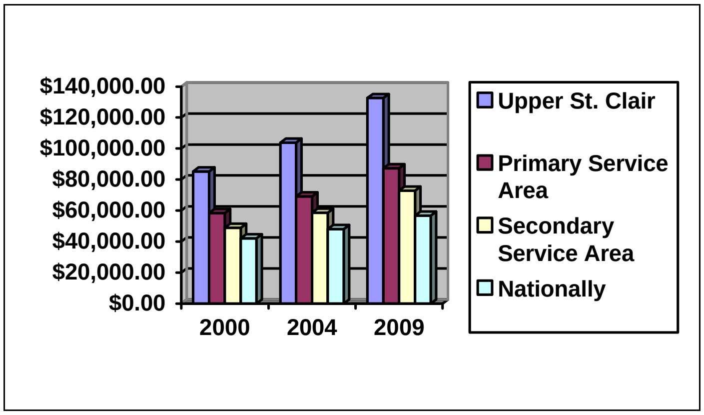
Chart- C



Median Household Income:

	2000 Census	2004 Est.	2009 Proj.
Upper St. Clair	$85,280	$103,748	$132,604
Primary Service Area	$58,450	$69,167	$87,371
Secondary Service Area	$48,960	$58,523	$72,827
Nationally	$42,164	$48,124	$56,710

Chart- D



Note: The median household income level must be balanced against the cost of living for the area to determine possible discretionary income available for recreation purposes. While the income levels for the Upper St. Clair primary service area are considerably higher than the national average, the relative cost of living for the area is generally higher as well. The higher median household income level is reflective of a suburban area with an older, high income population. It is also startling to see the very large differential in median household income level between Upper St. Clair proper and the rest of the primary service area.

Primary Service Area Household Income Distribution:

	2000 Census	2004 Est.	2009 Proj.
-$24,999	17.3%	13.5%	9.6%
$25,000-$49,999	24.7%	21.4%	15.9%
$50,000-$74,999	20.4%	19.2%	16.9%
$75,000-$99,999	14.4%	13.7%	13.6%
$100,000-$200,000	17.4%	23.5%	29.6%
$200,000+	5.8%	8.8%	14.5%

It is important to realize that in 2004 even with a high median household income it is estimated that approximately 35% of the households are below the national median number, and 54% make less than $75,000 per year.

Demographic Summary:

- The population is expected to show a slight decline during the next five years.
- The population density is generally medium to low.
- The median age is significantly above the national level and is expected to remain there.
- Household size is substantially lower than the national average indicating a smaller number of households with younger children.
- Median household income is substantially above the national levels and there is a very high education level.
- The Township of Upper St. Clair has similar characteristics as the primary service area but a much higher median household income level.
- The secondary service area has similar characteristics as the primary service area but it is slightly younger and has a lower median household income level.

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

Participation Estimates - Primary service area from the National Sporting Goods Association (based on 2004 population estimates).

Table- C

	Income	Age (avg.)	Region	Nation	Average
Aerobics	11.1%	9.8%	10.8%	10.9%	10.7%
Basketball	12.6%	9.5%	10.3%	10.9%	10.8%
Exer/equip	21.2%	17.6%	18.5%	19.0%	19.1%
Exer. Walk	30.6%	31.0%	30.0%	31.0%	30.7%
Martial Arts	2.1%	1.6%	1.7%	1.9%	1.8%
Running/jog	9.4%	7.5%	7.9%	9.0%	8.5%
Racquetball	.9%	.8%	.8%	1.0%	.9%
Rock Climbing	1.1%	1.1%	.8%	1.2%	1.1%
Swimming	21.0%	17.1%	20.8%	18.4%	19.3%
Tai Chi/Yoga	2.1%	1.9%	2.1%	2.2%	2.1%
Volleyball	5.0%	3.5%	4.1%	4.1%	4.2%
Workout Club	14.2%	10.4%	13.6%	11.5%	12.4%

Income- Participation based on the 2004 estimated median household income in the primary service area.

Age (avg.)- Participation based on averaging participation by different age groups in the primary service area.

Region- Participation based on regional statistics (Middle Atlantic, U.S.).

Nation- Participation based on national statistics.

Average- Participation based on the average of the other four categories.

When looking at participation rates in various recreation activities, the National Sporting Goods Association uses four different determiners for their percentages. Utilizing the average of these four categories takes into consideration each of the factors that can influence participation rates.

Anticipated Participation Numbers by Activity: Utilizing the average percentage from Table- C above plus the 2000 census information and census estimates for 2004 and 2009 (over age 5).

Table- D

	Average	2000 Part.	2004 Part.	2009 Part.	Difference
Aerobics	10.7%	5,383	5,445	5,411	+28
Basketball	10.8%	5,433	5,495	5,462	+28
Exer/equip	19.1%	9,609	9,719	9,659	+50
Exer. Walk	30.7%	15,444	15,621	15,525	+81
Martial Arts	1.8%	906	916	910	+5
Running/jog	8.5%	4,276	4,325	4,298	+22
Racquetball	.9%	453	458	455	+2
Rock Climbing	1.1%	553	560	556	+3
Swimming	19.3%	9,709	9,821	9,760	+51
Tai Chi/Yoga	2.1%	1,056	1,069	1,062	+6
Volleyball	4.2%	2,113	2,137	2,124	+11
Workout Club	12.4%	6,238	6,310	6,271	+33
Total		**61,173**	**61,875**	**61,493**	**+320**

Note: The estimated participation numbers indicated above are for each of the sports listed and do not necessarily translate into expected attendance figures at an Upper St. Clair Community Recreation 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 primary service area.

Participation Correlation: One of the primary orientations of many community recreation centers is often a significant indoor aquatics area. With this in mind, and utilizing information provided by the National Sporting Goods Association's 2003 survey, the following correlation between people who participate in swimming and other recreational activities is possible.

Table- E

	% of Swimmers	% of Activity Part.
Aerobics	19.6%	32.9%
Basketball	25.1%	42.3%
Martial Arts	5.0%	48.7%
Exer. Walking	46.3%	27.4%
Exer/equip	30.7%	29.6%
Running/Jogging	21.3%	43.7%
Volleyball	12.4%	55.7%

Percent of Swimmers- The percentage of swimmers who would participate in the given activity.

Percent of Activity Participants- The percentage of the listed activity participants who would also participate in swimming.

These correlation statistics indicate the strong relationship between those people who participate in aquatics and other activities. These statistics also indicate the importance of having an aquatics amenity in a recreation facility to increase overall usage of the center.

Below are listed a variety of indoor recreation activities and the relative market strength and rate of participation.

Summary of Sports Participation: The following chart summarizes participation in various sports and leisure activities utilizing information from the 2003 National Sporting Goods Association survey.

Table- F

Sport	Rank	% Part.	Age Group
Exer. Walk	1	30.7%	25 - 34
Exer/equip	3	19.1%	25 - 34
Swimming	4	19.3%	7 - 11
Workout Club*	N/A	12.4%	25 - 34
Aerobics	9	10.7%	25 - 34
Basketball	10	10.8%	12 - 17
Running/jog	15	8.5%	25 - 34
Volleyball	24	4.2%	12 - 17
Martial Arts	37	1.8%	7 - 11
Tai Chi/Yoga	N/A	2.1%	25 - 34
Climbing	N/A	1.1%	25 – 34
Racquetball	N/A	.9%	25 - 34

Rank - Popularity of sport based on national survey.

% Part. - Percent of population that would participate in this sport based on the average in Table-C.

Age Group - The age group with the highest level of participation based on national survey.

* If Workout at Club were ranked it would be in the 8th spot.

Note: Age group participation is on a bell curve, with the age group noted having the highest rate and then declining from there.

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.

Pennsylvania participation numbers in selected indoor sports - As reported by the National Sporting Goods Association in 2003.

Table- G

Sport Participation		**Age Group**	**Largest #**
(in thousands)			
Exer. Walking	3,354	25-34	35-44
Swimming	2,186	7-11	12-17
Exer. w/Equipment	1,907	25-34	35-44
Workout at Club	1,445	25-34	25-34
Aerobics	1,237	25-34	25-34
Basketball	1,125	12-17	12-17
Running/Jogging	713	25-34	25-34
Volleyball	410	12-17	12-17

Participation - The number of people (in thousands) in Pennsylvania who participated more than once in the activity in 2003 and were at least 7 years of age.

Age Group - The age group in which the sport is most popular. The age group where the highest percentage of the age span participates in the activity. Example: The highest percent of an age group that participates in exercise walking is 25-34. **This is a national statistic.**

Largest # - The age group with the highest number of participants. Example: The greatest number of exercise walkers is in the 35-44 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.**

When comparing these statistics to the national numbers in Table-F, there are only a few differences notably that swimming and volleyball are more popular in Pennsylvania than the national ranking while exercising with equipment is less popular. There are only state statistics for a limited number of activities, so statistics are not available for martial arts, racquetball, tai chi or climbing walls.

Another method to measure sports participation statistics compares the percentage of the national population from the state with the percentage of national participation in a variety of sports.

Pennsylvania sports percentage of participation compared with the population percentage of the United States -

Pennsylvania's population represents 4.5% of the population of the United States (based on 2000 census statistics).

Table- H

Sport Participation Percentages	
Workout at Club	4.9
Swimming	4.6
Aerobics	4.4
Exer. Walking	4.2
Basketball	4.0
Exer. w/Equipment	3.9
Volleyball	3.9
Running/Jogging	3.1

Note: Sport participant percentages refer to the total percent of the national population that participates in a sport that comes from the state of Pennsylvania. It is significant that in only two sports (swimming and workout at club) is the percentage of participation is at or above the percentage of the national population. This is a relatively weak rate of participation compared to many states and indicates a potentially lower base from which to draw facility users.

Market Potential Index: Another method to measure possible participation in recreation and fitness activities is through the market potential index where rates of participation in the primary service area are compared with national numbers through the index rating. Utilizing information provided by ESRI, the following comparisons are possible.

Table- I

	# of Adults	Percentage	MPI
Aerobics	4,564	10.9%	116
Basketball	3,469	8.3%	87
Exercise at Club (2 times/wk)	5,494	13.1%	127
Exer. Walking	16,838	40.1%	123
Swimming	9,303	22.2%	121
Weight Lifting	5,495	13.1%	122
Running/Jogging	4,948	11.8%	118
Volleyball	1,522	3.6%	93
Yoga	2,116	5.0%	129

# of Adults- The number of adults in the primary service area participating in the sport.

Percentage- The percentage of adults in the primary service area participating in the sport.

MPI- Market potential index as compared to the national number of 100.

The MPI index indicates that the rate of adult participation in all of the activities except for basketball and volleyball is well above the national average. This shows a likely high rate of usage for a community recreation center.

Recreation Expenditures 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- J

	Avg. Spent	SPI
Fees for Participant Sports	$184.58	163
Fees for Recreational Lessons	$201.68	168
Social, Recreation, Club Membership	$268.89	167
Exercise Equip./Game Tables	$307.47	142
Other Sports Equipment	$30.06	144

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.

The SPI index indicates that in all areas the rate of spending is far higher than the national average. This shows that there is probably a high rate of discretionary spending for the types of services that a community recreation center could provide.

Non-Sports Participation Statistics: It is recognized that most community recreation 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.

While there is not the breadth of information available for participation in these types of activities as compared to sports endeavors, there are statistics that can be utilized to help determine the market for cultural arts activities and events. Beginning in 1982 and at selected intervals there after the National Endowment for the Arts has sponsored the "Survey of Public Participation in the Arts" to determine the extent to which Americans participate in the arts. Information extracted from the 2002 survey indicates the following.

Personal Participation in the Arts

U.S. adults (over age 18) who have personally performed or created works in cultural arts activities in 2002 (at least once).

Table- K

Activity	% of Adults	# of Adults
Music		
Jazz	1.3%	2.7
Classical Music	1.8%	3.7
Opera	.7%	1.4
Choir/Chorale	4.8%	9.8
Composing Music	2.3%	4.7
Plays		
Musical Plays	2.4%	4.9
Non-musical Plays	1.4%	2.9
Dance		
Ballet	.3%	.6
Other Dance	4.2%	8.6
Visual Arts		
Drawing/Painting	8.6%	17.6
Photography	11.5%	23.5
Pottery/Jewelry	6.9%	14.1
Weaving/Sewing	16.0%	14.1
Literature		
Writing	7.0%	14.4

% of Adults – the percentage of adults (18 years and older) in the U.S. who participated in the activity at least once during 2002.

# of Adults – the number of adults (in millions) in the U.S. who participated in the activity at least once during 2002.

These statistics indicate a strong number of individuals who personally participate in certain cultural arts activities. The different activity classifications are very broad and include a variety of specific events.

General Attendance for Arts Activities

U.S. Adults (over age 18) who attended a cultural arts activity in 2002 (at least once).

Table- L

Activity	% of Adults	# of Adults
Music		
Jazz	10.8%	22.2
Classical Music	11.6%	23.8
Opera	3.2%	6.6
Plays		
Musical Plays	17.1%	35.1
Non-musical Plays	12.3%	25.2
Dance		
Ballet	3.9%	8.0
Other Dance	6.3%	12.1
Visual Arts		
Art Museums/galleries	26.5%	54.3
Art/craft Fairs & Festivals	33.4%	68.4
Historic Sites		
Parks/historic buildings	31.6%	64.7
Literature		
Plays/poetry/etc.	46.7%	95.3

% of Adults – the percentage of adults (18 years and older) in the U.S. who attended an activity at least once during 2002.

# of Adults – the number of adults (in millions) in the U.S. who attended an activity at least once during 2002.

This table indicates an even stronger number of individuals who attend certain cultural arts activities.

Much like sports participation, attendance and participation in cultural arts activities is higher among the more educated and higher income adult individuals. However, participation is generally higher in the middle age (35-64) groups while sports participation is higher in the youth and younger adult age groups.

Participation in Arts Classes or Lessons

Individuals who participated in arts classes and lessons.

Table- M

Activity	% Anytime in Life	% in 2002
Music	33.9%	1.4%
Visual Arts	16.5%	1.7%
Acting	7.0%	.5%
Ballet	6.4%	.1%
Other Dance	11.4%	.7%
Creative Writing	13.1%	1.0%
Art Appreciation	18.3%	1.0%
Music Appreciation	16.1%	.6%

% Anytime in Life – the percentage of adults in the U.S. who took lessons in the activity at least once during their lifetime.

% in 2002 – the percentage of adults who took lessons in the activity at least once during 2002.

This table indicates the percentage of people who took lessons in a variety of activities either in their lifetime or in 2002.

General Attendance for Arts Activities by Region

U.S. Adults (over age 18) who attended a cultural arts activity in 2002 (at least once) in the Mid Atlantic Region of the country.

Table- N

Activity	% of Adults	% Mid Atlantic
Music		
Jazz	10.8%	11.1%
Classical Music	11.6%	10.6%
Opera	3.2%	4.2%
Plays		
Musical Plays	17.1%	22.0%
Non-musical Plays	12.3%	13.9%
Dance		
Ballet	3.9%	4.0%
Other Dance	6.3%	5.3%
Visual Arts		
Art Museums/galleries	26.5%	26.8%
Art/craft Fairs & Festivals	33.4%	33.2%
Historic Sites		
Parks/historic buildings	31.6%	33.9%
Literature		
Plays/poetry/etc.	46.7%	49.7%

% of Adults – the percentage of adults (18 years and older) in the U.S. who attended an activity at least once during 2002.

# of Adults – the percentage of adults (18 years and older) in the Mid Atlantic region of the U.S. who attended an activity at least once during 2002.

This table indicates a slightly stronger rate of attendance of most cultural arts activities in the Mid Atlantic region than the general U.S. population.

In an attempt to develop a more direct comparison between the rates of participation in various leisure activities, the NEA survey ranked the following activities.

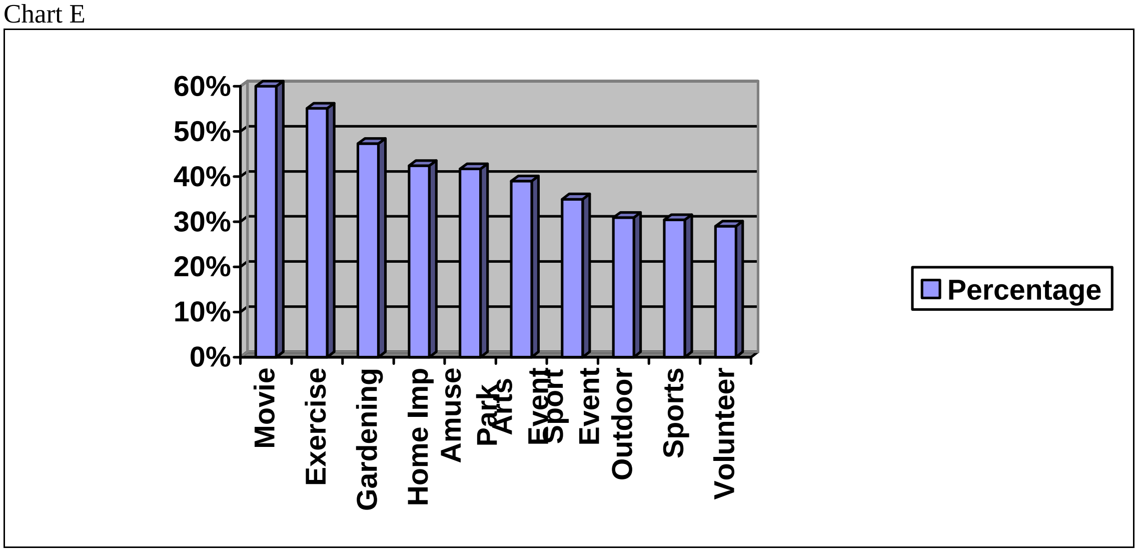
Rates of Participation in Leisure Activities in 2002:

Table- O

Activity	Percentages
Went to Movies	60.0%
Exercised	55.1%
Gardening	47.3%
Home Improvements	42.4%
Amusement Parks	41.7%
Attend Arts Event	39.0%
Attend Sport Event	35.0%
Outdoor Activities	30.9%
Played a Sport	30.4%
Volunteer/charity	29.0%

Percentages – refers to the percentage of the adult U.S. population that participated in the activity (at least once) in 2002.

Chart E



In relationship to sports participation and other leisure activities, participation in cultural arts is not as high but is still significant in the number of participants that are involved in these activities.

Recreation Activity and Facility Trends: There continues to be very strong growth in the number of people participating in recreation and leisure activities. It is estimated that one in five Americans over the age of six participates in some form of fitness related activity at least once a week. American Sports Data, Inc. reported that membership in U.S. health clubs has increased by 76.1% between 1987 and 1999, and memberships in health clubs reached an all time high of 32.8 million in 2000. The greatest increase in membership has occurred in the over 55 age group, followed by the under 18 and 35-54 age categories. Overall membership in the 35-54 age group increased while it actually decreased in the 18-34 age group. Statistics also indicate that approximately 12 out of every 100 people of the U.S. population (or 12%) belong to a health club. On the other side most public recreation centers attract between 20% and 30% of a market area (more than once) during the course of a year. All of this indicates the relative strength of a market for a community recreation facility. However despite these increases the American population as a whole continues to lead a rather sedentary life with an average of 25% of people across the country reporting that they engage in no physical activity (according to The Centers for Disease Control).

One of the areas of greatest participant growth over the last 10 years is in fitness related activities such as exercise with equipment, aerobic exercise and group cycling. This is also the most volatile area of growth with specific interest areas soaring in popularity for a couple of years only to be replaced by a new activity for the coming years. Also showing particularly strong growth numbers are basketball and running/jogging while swimming participation remains consistently high despite recent drops in overall numbers. It is significant that many of the activities that can take place in an indoor recreation setting are ranked in the top fifteen in overall participation by the National Sporting Goods Association.

The multi-component concept of delivering sports, fitness, and recreation services continues to grow in acceptance with the idea of providing for a variety of activities and programs in a single location. This idea has proven to be financially successful by centralizing operations for recreation departments and through increased generation of revenues from patrons able to participate in multiple and varied leisure needs under the same roof. These facilities have become identifiable centers for communities, and have promoted "family" recreation values. The keys to success revolve around the concept of intergenerational use in a quality facility that has multi-use capabilities and the versatility and flexibility to meet ever-changing leisure needs.

Aquatic Activity and Facility Trends: Without 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 (for both indoor and outdoor pools). The age of the conventional pool in most recreational settings is nearly dead. 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 the potential to sell more admissions and increase revenues. It is estimated conservatively that a leisure pool can generate up to 30% 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 with this type of pool than a conventional aquatics facility. Revenues for aquatic centers are also enhanced when they are combined with other indoor and outdoor recreation amenities.

Despite the recent emphasis on recreational swimming the more traditional aspects of aquatics (including swim teams, instruction and aqua fitness) remain as the foundation for many indoor and outdoor 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 and other community based organizations continue to be important. Aquatic 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.

The family oriented outdoor (and indoor) water park concept of delivering aquatics services continues to grow in acceptance with the idea of providing for a variety of interactive aquatics activities and programs in a park like setting that features a lot of grass, shade structures, sand play areas and natural landscapes. This concept has also been taken indoors where aquatics activities and programs are provided in an open design setting that features a lot of natural light, interactive play features and access to an outdoor sun deck. The placing of traditional instructional/competitive pools with shallow depth/interactive leisure pools in the same facility has been well received in the market.

A new concept is the spray ground, where a number of water spray features are placed in a playground setting where there is no standing water but the water is treated and recirculated much like a pool. This provides a fun yet safe environment where drowning is not a concern and lifeguards are not necessary.

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 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 as well as the organization that operates the facility. The medical sector receives the benefit of a large aquatics 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 the traditional medical setting. 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 uses occur during the slower mid morning or afternoon use times in the pool and the center. In addition to therapy pools being used for medical purposes they have also been transformed into more of a spa for relaxation and socialization. This has been effective in bringing in swimmers who are looking for a different experience and non-swimmers who want the advantages of warm water in a different setting. The development of natural landscapes have enhanced this type of amenity and created a pleasant atmosphere for adult socialization.

Swimming is third only behind exercise walking and camping in popularity of sports and leisure activities, meaning that there is a significant market for aquatics activities. Approximately 21% of the population in the Mid Atlantic region of the country participates in aquatics activities. The largest age group for participation in aquatics activities is in the younger age groups, with over 40% of all kids ages 7-11 participating in swimming. More than 34% of all swimmers are under the age of 18 years, and nearly half are under the age of 25. Individuals that swim do so on a regular basis with an average of 43 days a year. This indicates that there is not only a large segment of the population that participates in aquatics activities but they do so on a relatively consistent basis. In addition, swimmers participate in a wide variety of other activities and a large number of sports and fitness participants are also swimmers. Within the state of Pennsylvania, swimming is the number two most participated in sports activity behind exercise walking.

Below are listed those sports activities that would be often take place indoors in a community recreation center and the percentage of growth or decline that each has experienced nationally over the last 10 years (1993-2003).

Table- P

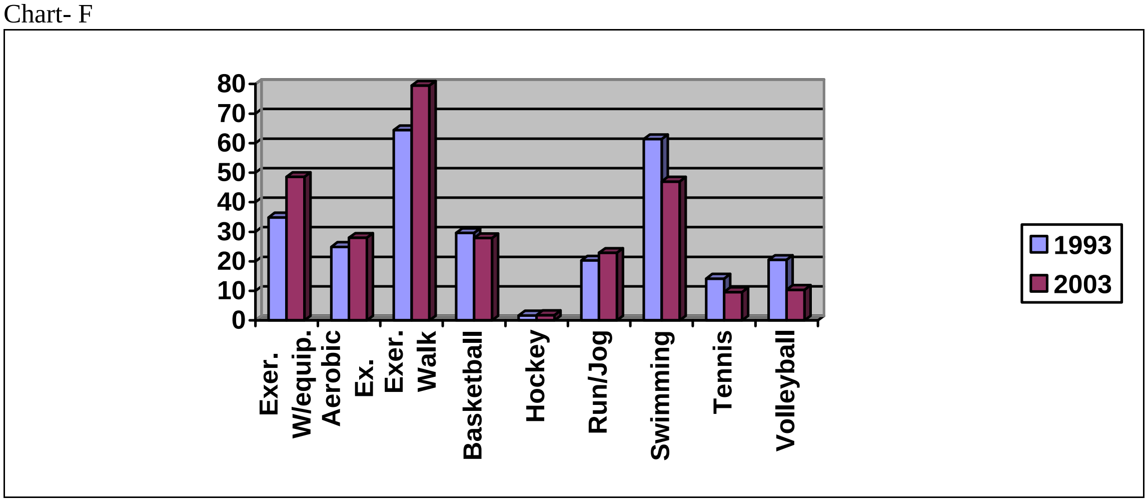
Sport/Activity	1993 Part.	2003 Part.	% Change
Exercising w/Equip.	34.9	48.6	+39%
Exercise Walking	64.4	79.5	+23%
Running/Jogging	20.3	22.9	+13%
Aerobic Exercising	24.9	28.0	+12%
Ice Hockey	1.7	1.8	+6%
Basketball	29.6	27.9	-6%
Swimming	61.4	47.0	-23%
Tennis	14.2	9.6	-32%
Volleyball	20.5	10.4	-49%

1993 Participation - The number of participants per year in the activity (in millions) in the United States**.**

2003 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 1993 to 2003.

Chart- F



In addition to sports participation trends the following chart shows how cultural arts participation has changed from 1992 to 2002.

Personal Participation in the Arts 1992-2002

Table- Q

Activity	1992 Part.	2002 Part.	% Change
Music			
Jazz	3.2	2.7	-16%
Classical Music	7.8	3.7	-53%
Opera	2.0	1.4	-30%
Choir/Chorale	11.7	9.8	-16%
Composing Music	3.9	4.7	+21%
Plays			
Musical Plays	7.1	4.9	-31%
Non-musical Plays	3.0	2.9	-3%
Dance			
Ballet	.4	.6	+50%
Other Dance	15.0	8.6	-43%
Visual Arts			
Drawing/Painting	17.8	17.6	-1%
Photography	21.6	23.5	+9%
Pottery/Jewelry	15.6	14.1	-10%
Weaving/Sewing	46.1	32.7	-29%
Literature			
Writing	13.7	14.4	+5%

1992 Participation - The number of participants per year in the activity (in millions) in the United States.

2002 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 1992 to 2002.

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

Gymnasiums
Pools (especially leisure pools)
Ice arenas
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 recreation centers. Leisure pools (with slides and interactive water features) that appeal to younger swimmers and non-swimmers as well as families and seniors have become extremely popular and are being built in conjunction with or instead of conventional pools. Weight/cardiovascular space is also in high demand and provides a facility with the potential to generate significant revenues (along with the leisure pool). Gyms, due to their flexibility and versatility are needed for both youth and adult activities. Ice arenas, although expensive to build and operate, have the potential to have a very positive cash flow and growth in hockey has been phenomenal over the last 10 years.

The success of most public recreation centers 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. With a continuing increase in single parent households and two working parent families, the needs of school age children for before and after school child care continues to grow as does the need for preschool programming.

The ever increasing demand for programming has put a real squeeze on the number of indoor recreation facilities that are available. Recreation has historically utilized school facilities during non-school hours for its programs and services. However, the limits of using school facilities, the growth in school sports, and the lack of daytime program space has pushed communities to build separate recreation centers or partner with schools to enlarge facilities. Even with these new centers, use of school buildings has continued to be strong and has allowed for the growth in programs and services.

The newest trend in public centers is to develop more specialized services and programs such as personal trainers, massage therapists, and even sports medicine and physical therapy services through partnerships with health care providers.

As more and more communities attempt to develop more upscale public recreation centers 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 were public community 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 recreation 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.

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

- The majority of community recreation 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 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 $1,200,000 and $1,500,000 annually. Nearly 60% of the operating costs are from personnel services, followed by approximately 28% for contractual services, 10% 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 800 and 1,500 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 run anywhere between 25% to 50% higher than the resident rate. 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 $200 and $300 for adults, and $100 and $200 for youth and seniors. Family annual passes tend to be heavily discounted and run between $350 and $800.

- Most centers are open an average of 100 hours a week, with weekday hours being 6:00am to 10:00pm, Saturdays 8:00am to 8:00pm and Sundays from noon to 8:00pm. 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 primary service area and the trends in indoor recreation amenities, there are specific market areas that need to be addressed with such community facilities. These include:

<u>General</u>

1. Drop-in recreation activities - Critical to the basic operation of any public recreation 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 recreation 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. Specialized Services – Providing specialized services such as personal training, massage therapy, sports medicine and physical therapy is becoming more prominent in public recreation centers and they have become major revenue sources for facilities.

4. 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.

5. 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.

6. 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.

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 public recreation 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 primary service area continues 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.

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. 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.

Indoor Recreation, Sports and Fitness Service Providers: There are currently a considerable number of facilities that are supplying recreation, fitness and sports activities.

The township has very limited indoor facilities. The main center is the Upper St. Clair Community Center that has three meeting/activity rooms and is located within the township building. The other facility is the Upper St. Clair Recreation Center which is located a short distance away and is a small building that has a large open room with a small kitchen and a game room. Each of these facilities supports not only community meetings and functions but also the township's recreation programs. The other primary indoor recreation amenity is the Upper St. Clair Tennis Bubble which serves the tennis needs of the community. However, due to the passive orientation of the community center and recreation center the township's recreation department is highly dependent on the school district's indoor pool (a five lane pool at the high school) and numerous school gyms and classroom areas for many programs. It is apparent that the first priority for any new recreation center should be to accommodate existing recreation programs and services that are being offered at inadequate facilities (senior programs) or make use of spaces that do not have active recreation as their primary function (community center for fitness classes and school buildings in general).

Besides the Township of Upper St. Clair's facilities several of the other townships and municipalities in the area also have indoor recreation amenities.

Bethel Park – The municipality has a relatively new community center that serves seniors, youth and other general community activities. The center also has a large community room that can be used for rentals but the center has a very decided passive orientation with no active elements such as a gym, pool or fitness area. There are long range plans to add a gymnasium to the building. With a community center orientation this facility has very little to no effect on the Upper St. Clair market.

Mt. Lebanon Recreation Center – This public center is primarily a full sized ice rink with a smaller studio sheet of ice. Upstairs there are a series of meeting rooms and offices. There is also a large outdoor aquatic center attached to the complex. Within the last year there was an effort to develop a partnership between the township and St. Clair Hospital to build a joint recreation/wellness center but the project never moved forward. At the present time this facility would have very little impact on an Upper St. Clair Recreation Center unless a more comprehensive center is built in the future.

Peters Township Recreation Center – This new center features a large gymnasium, indoor elevated track, an aerobics/dance room, large multipurpose room, a game room and several smaller conference/meeting rooms. Upstairs is a large stretching area that may eventually serve as a weight/cardio equipment area. There are also long range plans to add an outdoor pool to the complex. It is significant that no fees are collected for drop-in use of the gym or track. With its current amenities this facility will also have very bearing impact on the Upper St. Clair market.

In addition to public facilities there are also a couple of non-profit recreation facilities as well.

South Hills YMCA – Currently this facility is an older two story building that has meeting and child care rooms only. The center also has an older outdoor pool that is failing and in need of being replaced. However, the YMCA has plans to build a new full-service center in the area and have looked at sites in both Upper St. Clair and Bethel Park. It appears that the YMCA is waiting to see what decision Upper St. Clair will make regarding a center before committing to a location for their facility. If a new YMCA is built anywhere in the primary service area the facility will have a significant impact on the market.

Jewish Community Center – This newer, full-service recreation facility is located just north of Upper St. Clair. The facility has an indoor 6 lane pool, a very small weight/cardio fitness room, a small group exercise room, a large gym, a number of multipurpose rooms and a significant childcare center. This center will somewhat limit market growth to the north but the small sized fitness elements are not able to accommodate a large membership base. This facility will limit growth of the market to the north to a least a small degree.

Healthtrax Fitness & Wellness

Jewish Community Center

Besides the public and non-profit providers there are a significant number of private fitness centers in the area. There are a number of smaller storefront facilities but also several larger clubs as well.

Healthtrax Fitness & Wellness – This full service club is located on the eastern side of Bethel Park but it still draws users from some of the same projected service area as a proposed Upper St. Clair Recreation Center. The facility serves an upscale market due in part to its partnership with Mercy Hospital and orientation toward an older adult clientele. The club has a small indoor lap pool and therapy pool, a large fitness area, three group exercise rooms, two racquetball courts and a small half gym. This is a first class, high-end facility and will provide direct competition for a township center that is focused on serving the same general market.

Cameron Wellness Center – Even though this club is located well to the south and outside of the primary service area it still has some influence on the market. This is impart due to its affiliation with The Washington Hospital and its focus on the upscale middle aged market. The club has a very large fitness floor, climbing wall, indoor elevated track, lap pool, therapy pool, small gym, group exercise room, pro-shop, spa services area, education rooms and outpatient rehab services clinic.

Health Club at South Pointe – This is a more traditional health club located to the south and west of Upper St. Clair. It has a very strong fitness orientation and will have some bearing on the market for an adult oriented public fitness center.

Alexander's Athletic Club – This is a club that has more of a middle income market focus and it is located south of the primary service area. However the center is a viable alternative but will have a limited impact on the market for an Upper St. Clair because of its distance.

St. Clair Fitness & Racquet Club – Located just down the street from the township building this club is a relatively small, older facility that has a large number of racquetball courts and a small fitness area. The orientation of the club is considerably different than a public center and it would not have any direct impact on the market for a center unless the facility were to be located along McLaughlin Run Road.

Bally's – This chain fitness shop attracts the younger adult market and will have virtually no bearing on the public sector or higher end market.

When all of the current providers are reviewed the greatest concern on the market for an Upper St. Clair Recreation Center would come from the YMCA, the JCC, Healthtrax and any future facility that might get built in Mt. Lebanon.

Outdoor Aquatic Service Providers: There are also a considerable number of outdoor aquatic facilities in the greater Upper St. Clair area, but it is significant that there is no outdoor public pool in the community.

Many of the public entities to the north and west of Upper St. Clair have outdoor pools.

Dormont Pool – Located in Dormont Borough, this old long and narrow pool features a zero depth entry along one side as well as a big slide. This is a popular pool that draws very strongly from the north side of the service area. Due to its distance the pool will not have a significant influence on the market for an Upper St. Clair Aquatic Center.

Scott Township Pool – This newer 50 meter pool is located in a large regional park. It has a slide as well as a mushroom fixture. This pool draws well from both Scott Township and Mt. Lebanon and is located close enough to the primary service area to impact the market to a degree.

Mt. Lebanon Pool – This pool is connected to the Mt. Lebanon Recreation Center and Ice Rink and is similar in many ways to the Scott pool but it is not as nice and is an older facility. Again because of its proximity to the primary service area the pool will have some influence on the Upper St. Clair market.

South Park Wave Pool – This facility is located within South Park and is operated by Allegheny County. The pool is a major facility immediately to the east of the primary service area and its unique wave feature separates it from all the other pools in the area. This facility will definitely have a significant impact on the eastern market for an Upper St. Clair Aquatic Center.

In addition to the public pools the *South Hills Area YMCA* also operates an outdoor pool in Upper St. Clair but this an older conventional pool facility that is failing and in need of being replaced.

Scott Township Pool

South Park Wave Pool

Besides the pools noted above there are also a substantial number of private swim clubs, country club pools and apartment complex pools in the area. Most of these are small, rectangular, conventional pools that serve more of a social role than anything else. The Montclair Swim Club, Hidden Valley and Bower Hill Swim Club are older and smaller facilities while Woodland Hills Swim Club is newer and has slides and other play features. Most of the country club pools are larger and include more grass areas and landscaping but are still conventional pools.

After analyzing the current providers the greatest concern on the market for an Upper St. Clair Aquatic Center would come from the other public pools to the north and west, especially the Scott and South Park facilities. Despite the fact that there are a number of private swim clubs in the area they do not have the leisure pool focus that a modern public aquatic center would have.

Alternative Indoor Recreation Service Providers: Below is a list of the alternate recreation service providers (facilities) that are located in the greater Upper St. Clair market area.

Township

Upper St. Clair Recreation Center	Upper St. Clair Tennis Bubble
Upper St. Clair Community Center	

Private

Health Club at South Pointe	Healthtrax Fitness & Wellness
St. Clair Fitness & Racquet Club	Bally's
Cameron Wellness Center	Alexander's Athletic Club

Non-Profit

South Hills Area YMCA	Jewish Community Center

Public

Mt. Lebanon Recreation Center	Bethel Park Community Center
Peters Township Recreation Center	Upper St. Clair High School Pool
Upper St. Clair School Facilities	

Alternative Outdoor Aquatic Centers: Below is a list of the alternate outdoor aquatic centers that are located in the greater Upper St. Clair market area.

Public

Dormont Pool	Mt. Lebanon Pool

Scott Township Pool	South Park Wave Pool

Private Swim Clubs

Woodland Hills Swim Club	Bower Hill Swim Club
Montclair Country Club	St. Clair Country Club
Rolling Hills Country Club	Hidden Valley Swim Club
Hickory Heights Country Club	Valley Brook Swim & Tennis

Non-Profit
South Hills Area YMCA

This is a representative listing of alternative recreation/aquatics facilities in the area and is not meant to be a total accounting of all service providers. In addition to the facilities noted above there are also a considerable number of small private store front fitness centers, as well as amenities in apartment complexes and local churches. Most of the high schools in the area also have indoor competitive pools. There may be other facilities located in the area that have an impact on the Upper St. Clair market as well.

In addition several communities (Mt. Lebanon and South Fayette) may consider building indoor facilities in the future, the YMCA is considering the development of a full-service Y either in Upper St. Clair or Bethel Park and a new private fitness center (Club One) is planned in Mt. Lebanon.

Market for a Public Recreation Center: With any proposed public community recreation center 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 Upper St. Clair primary service area with a population of just under 55,000 is right at the population base needed to support (cover operating expenses with revenues) a comprehensive public community recreation center. The ability to draw even a small percentage of the secondary service area on at least an occasional basis will contribute to the financial success of the center.

- The population of the area is expected to show a slight decline in the next five years which will not provide any potential additional users for the facility.

- The population of the primary service area is significantly older than the national median level and the median household income is much higher as well.

- 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 (YMCA's) 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 (again in areas beyond sports and fitness) 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 centers 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 center 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 facilities 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.

- There are estimated to be approximately 54,500 individuals in the primary service area. If the full 15% are captured by the private sector (a large percentage since there are so many private providers) this would result in to approximately 8,175 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%. Some of this market is being taken from the non-profit providers including the YMCA and JCC but even at 10% of this market that still leaves a market of 5% for an Upper St. Clair Community Recreation Center. Capturing 5% of the primary service area market would convert to approximately 2,725 users that could be potential annual pass holders.

- 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 realistic percentage of that market that can be captured by a facility. Weekly participation in active recreation activities from individuals within the primary service area can be expected to be somewhere in the range of 15% to 20% of the population which equals approximately 8,175 to 10,900 individuals, (based on 2004 population estimates for the primary service area). Even if a new center were able to capture as little as 20% of this pre-qualified market this would convert to 1,635 to as many as 2,180 potential annual pass holders. Participation rates for more passive oriented facilities are more difficult to project due to the lack of reliable utilization rates for such activities, but the level of use is below that of a more active facility and the potential service area is also considerably smaller as well.

Market for a Public Outdoor Aquatic Center: In much the same manner as an indoor recreation center, the market for a public outdoor aquatic center needs to be analyzed.

- Approximately 19.3% of the population in the primary service area swims. This converts to 9,821 swimmers (over the age of 5).

- By taking the number of swimmers, times the average number of times swum per year (43 from 2003 NSGA standards) equals the total number of estimated uses per year (swimmer days) of 422,303.

- Capturing as few as 20% of these annual swimmer days would provide an Upper St. Clair Aquatic Center with approximately 84,460 swimmers.

- Using another method and factoring out a high rate of 50% of the days that may be captured by indoor pools that still leaves 211,151 swimmer days for outdoor pools. If 25% of the balance is taken by existing public outdoor pools (52,800) and 25% by private swim clubs (52,800), there is still a possible balance of 105,151 swimmer days from which a new Upper St. Clair Aquatic Center could draw from. If 20% of this number ends up using other aquatic amenities (including backyard pools) that still leaves 84,036 swimmer days for a new center.

Demographic Summary and Assessment of Need Conclusion: If an Upper St. Clair Community Recreation Center and an outdoor aquatic center is developed, the emphasis of the projects should be placed on providing quality of life benefits with corresponding facilities that attract the age groups that have the highest level of participants and a facility that serves unmet recreation and fitness needs. The fact that the demographic statistics show an older (as compared to the national population) age group distribution should be kept in mind since the principal age range for active recreational activities is 18 to 34 years. During the next five years the fastest growing segment of the population nationally will be in the 45 to 65 age category. The population in this age group is becoming increasingly more active and in tune with fitness and leisure activities and their recreation needs should be recognized.

There is not expected to be any population growth in the service area and in fact it is anticipated that there will be a small decline which will not add to the user base for the center. Household income is one of the prime determiners in recreation activity participation and the Township of Upper St. Clair and the primary service with its high median household income level will greatly increase the participation rate.

Overall, after reviewing the demographic information and the gaps in service from the other recreation and aquatic facilities in the immediate area, there is a definite market for an Upper St. Clair Community Recreation Center and outdoor aquatic center if it is focused on filling the unmet recreation needs of the immediate primary service area.

Section II – Project Options Analysis

As has been noted in the previous section determining the right market orientation for the planned Upper St. Clair Recreation Center and Upper St. Clair Aquatic Center is critical to the overall success of the project. With this in mind several facility options have been developed.

Community Center

Approximate Facility Size: 20,000 to 30,000 square feet

Financial Realities: Low capital investment, high operating subsidy. No user fees.

Market Orientation: This type of center provides mostly passive recreation activities and community functions and usually has a strong orientation toward youth and seniors. The center generally only serves a small portion of a community and does not have a larger service area.

Facility Description: Most community centers have a large community room with a kitchen that can be divided into smaller spaces, a series of classrooms, a senior and/or youth area and sometimes other specialized spaces such as a small library.

Site Issues: This type of facility rarely requires more than 3-5 acres and can be located in an area that does not have great visual awareness from a major street or intersection. These facilities are often built as part of a larger park or as part of a governmental campus (with a township hall, etc.)

Relationship with an Outdoor Aquatic Center: Due to the passive nature of the community center there is not a direct relationship with an outdoor aquatic center. While they could be located on the same site they should not have any physical connection. It is just as easy to locate the aquatic center elsewhere.

Overall Facility Assessment:

Pro's

- The facility is truly community based.
- There should be no conflict with other providers.
- Site is not a major concern.
- Reasonably low capital investment.
- Serves most age groups to some degree.
- Very low to no fees for use.

Con's

- Serves a relatively small market segment.

- Does not have active recreation amenities.
- Has poor revenue capabilities and a high operating subsidy.
- Focuses more on seniors and youth.

Recreation Center

Approximate Facility Size: 65,000 to 75,000 square feet

Financial Realities: High capital investment, able to come close to covering its operating costs with revenues. User fees are collected for all active use areas.

Market Orientation: Passive and active orientation with a variety of amenities that serve all age groups. The center generally serves the entire community as well as draws users from a larger service area. These facilities have a strong family orientation.

Facility Description: A recreation center usually has all of the elements that are found in a community center plus such active spaces as a gym, weight/cardio equipment area, group fitness room, indoor track, and an indoor pool with a leisure orientation. Other specialized spaces such as a climbing wall are often included.

Site Issues: This facility requires a minimum of 7 acres with 10 to 12 being preferred. These centers need to be located at a prominent site that is easily accessible from all areas of the primary service area. Ideally a recreation center is located with other active park amenities (such as ballfields).

Relationship with an Outdoor Aquatic Center: It is highly recommended that an outdoor aquatic center be located in conjunction with the recreation center. There should be a physical attachment that allows for easy movement between the amenities. Operating costs for the outdoor aquatic center should be less and revenues higher for both amenities if they are located together.

Overall Facility Assessment:

Pro's

- Serves both the active and passive markets.
- Has an appeal to all age groups and promotes multi-generational recreation opportunities.
- Strong family orientation.
- Site can enhance other recreation opportunities.
- Can be operationally self sufficient.
- Many different fee options are available.

Con's

- Is costly to build.

- Site must be large enough to accommodate the building, parking and other outdoor recreation amenities.
- Strong user fee approach.
- Will start to raise concerns with other providers.

Enhanced Recreation Center/Wellness Center

Approximate Facility Size: 70,000 to 80,000 square feet

Financial Realities: High capital investment, facility is able to cover all of its operating expenses and may contribute some dollars to debt retirement. Higher user fees

Market Orientation: Strong active orientation with limited passive use amenities. Requires a partnership with a healthcare provider. While the center serves all age groups it has a much higher emphasize on adults and seniors. The facility also has an orientation toward some medically based services. The center will need to draw users from beyond the community's boundaries to be financially successful.

Facility Description: An enhanced recreation center/wellness center contains all of the active elements of a recreation center but with a much larger fitness area. A therapy pool would also be added to the indoor pool. The center will usually have some multipurpose rooms and classroom space but may not have a designated senior area and usually does not have a youth center. The center has specialized services such as a sports medicine/rehab clinic and massage therapy.

Site Issues: Site is very important for this type of a facility. A highly visible location in close proximity to major highways is important. The site is often dictated by the health care provider. A site of 7 acres is needed and the facility is often not located within a park or in conjunction with other recreation amenities.

Relationship with an Outdoor Aquatic Center: While an outdoor aquatic center could be located on site with the recreation/wellness center, with less of a family orientation in the indoor center this is not as critical.

Overall Facility Assessment:

Pro's

- Operationally self sufficient and then some.
- Partnership with a health care provider.
- Medical orientation to programs and services.
- Heavy emphasis on health and wellness.

Con's

- Market is smaller and focused more on adults and less on the general community.

- Does not support many parks and recreation services.
- Is costly to build.
- Site is very important to project success.
- Without a partnership with the health care industry the project is not possible.
- Higher user fees limits use by segments of the population. Strong emphasis on annual passes for use.
- There will be definite concerns with the private and non-profit sector.

High End Wellness Center

Approximate Facility Size: 50,000 to 60,000 square feet

Financial Realities: High capital investment, the center is able to cover all operational costs and a majority if not all of the facility's debt service. High user fees.

Market Orientation: The center looks more like a private health club than a public recreation center. A partnership with a prominent hospital or other health care provider is absolutely essential. Primary orientation is on fitness and wellness and medically based services. The main market is higher income, middle aged adults. The center will have to draw well from the entire primary service area to be financially successful.

Facility Description: A high end wellness center has all of the active elements of the enhanced recreation center but usually no community spaces. The center also would have a retail sales area, spa, massage services and medical clinic.

Site Issues: The location of the facility is critical. It must be sited in a high traffic area and have a highly visible location from a major highway and intersection. A site of 5 acres to 7 acres is needed. The site will probably be dictated by the hospital or other health care provider.

Relationship with an Outdoor Aquatic Center: Locating the facility on the same site with an outdoor aquatic center is not recommended as the clientele are very different. The aquatic center should be located in more of a park setting.

Overall Facility Assessment:

Pro's

- The center is able to provide very specialized services.
- Able to cover all of its operating cost and debt service.
- No cost to taxpayers.

Con's

- The center will serve a very small market segment of the community.

- Without a partnership with the health care industry the project is not possible.
- High user fees limits use to most segments of the population. Must have a membership for use.
- Will not serve any parks and recreation needs.
- It will be costly to build.
- Site is critical.
- There will most likely be serious opposition to the project from other private health clubs.
- Any changes to the market will quickly impact the center.
- Real question of why the Township should be involved in such a project.

Market Opportunities

After analyzing the different options presented above it is important to look at the market opportunities that are available.

- There are currently a number of community center facilities in the area (Mt. Lebanon and Bethel Park) and Upper St. Clair has similar facilities already.

- There are two high end wellness centers (Healthtrax and Cameron) in the greater Upper St. Clair area.

- There are a significant number of private health clubs but nothing that approaches an enhanced recreation center/wellness center.

- There are really no true public recreation centers in the market, the closest is the Peters Township Recreation Center. There is one non-profit (JCC) that has a strong recreation orientation.

Outdoor Aquatic Center Options Analysis

While not as complicated or as critical as an indoor recreation center analysis there are still a number of options that should be investigated for an outdoor aquatic center.

Neighborhood Orientation – This would be the equivalent of a neighborhood swim club and would be sized to serve only a portion of the community. While the facility would have a decided leisure orientation it would have a bather load of only 300. It would have a reasonably low capital cost and still should be able to cover its cost of operation. This type of facility should be built in conjunction with an indoor recreation center.

Township Orientation – The facility would be designed to meet the needs of the Upper St. Clair community and would be closer to other public pools in size but would include a significant leisure orientation with zero depth entry, interactive play features, at least two slides, lap lanes, and concession area. This would be considered a family aquatic center. The bather load would be between 600 and 800 and the capital cost would be substantially higher than the neighborhood option. This facility could be developed with an indoor recreation center or as a stand alone facility.

Regional Orientation – This would be a significant regional aquatic center that would be designed to serve the southwest portion of the Pittsburgh metro area. The facility would be considerable in size and feature a number of commercially oriented aquatic amenities. Fees would be higher than the other two options and the bather load would need to be over 1,500 to as many as 2,000. This would be considered much the same as a commercial water park. The capital cost would be significant but the center would be able to cover all of its operating costs as well as a portion of its capital debt. This facility should be developed as a stand alone center.

Market Opportunities

After analyzing the different options presented above it is important to look at the market opportunities that are available.

- There are currently a number of small neighborhood swim clubs in Upper St. Clair and surrounding communities.

- While there are a significant number of larger public, community sized, pools in the primary service area there are not any true leisure pools or family aquatic centers.

- There is not a large regional water park in the area.

Final Program Determination: In an effort to determine the final orientation of the project, a citizens committee was appointed to review the facility options and make a recommendation as to how the center should be developed. In October 2005 a final report was issued by the Boyce Mayview Community Recreation Center Ad Hoc Advisory Group. The group recommended that more of a true recreation center be built that included an outdoor aquatic center, indoor aquatic center with a 50 meter pool and a wellness/fitness/social center also be included.

Section III – Project Program

The program presented below is based on the Ad Hoc Advisory Group's findings, the market opportunities that are available in the area and the desire to have the project be as financially self supporting as possible through fees and charges generated by the center itself.

Core Program: The suggested program for the proposed recreation center includes the following.

1. Aquatics area - A space of approximately 11,000 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, lazy river, 3 lap lanes, and zero depth entry. 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.).

2. Party rooms – Two rooms of 300 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.

3. Gymnasium - A space that is approximately 13,000 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 should be set up for a variety of activities including basketball and volleyball. Portable seating should be by tip and roll bleachers. A storage area of 400 sq.ft. must be attached to this area.

4. Running/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.

5. Weight/cardiovascular space - An area of at least 12,000 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.

6. 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. A storage area of 250 sq.ft. must be attached to this space.

7. Fitness studios – A studio of 1,000 sq.ft. to be used for specialized classes such as yoga, spinning and other activities. A storage area of 150 sq.ft. must be attached to the space.

8. Multipurpose 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 multipurpose room. This stage area can also be used as a small classroom. A storage area of 400 sq.ft. must be attached to this area

9. Kitchen - A catering and prep kitchen that is attached to the multipurpose room and has outside access for caterers. Approximately 500 sq.ft.

10. Drop-in childcare area – A room of approximately 950 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.

11. Support spaces - There must be sufficient space and resources allocated for the following (10,000 sq.ft.):

Lobby/lounge space (2,000 sq.ft.)
Front desk area (300 sq.ft.)
Office space for facility/program staff (2,000 sq.ft.)
Staff conference room/Public meeting (300 sq.ft.)
Locker rooms (Men's and Women's) (3,000 sq.ft.)
Family locker room (1,200 sq.ft.)
Maintenance office and work area (200 sq.ft.)
Restrooms (800 sq.ft.)
Vending (100 sq.ft.)

Total Square Footage	**63,710**
Net to Gross 25 %	**15,928**
Gross Square Footage	**79,638**

Optional Spaces: These spaces could be considered for addition to the facility but would reduce the overall cost recovery level.

1. Competitive pool - A space of approximately 11,000 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),

2. Senior activity area – An area of approximately 1,500 sq.ft. that includes a reception desk and a small office area, open lounge space, and senior service provider rooms (2 small clinic rooms of 120 sq.ft. each).

3. Teen/Game room – An area of approximately 1,500 sq.ft. that includes a game area, pool tables and a small computer space.

Other Spaces with a Partner: – These spaces should only be considered with a formal partnership agreement.

1. Hospital or health care provider space – An area with a separate entrance that is leased by a hospital or other health care provider. This area must have quick, easy access to the weight/cardiovascular fitness area and the therapy pool. Approximately 3,500 sq.ft.

2. Therapy pool – Located immediately adjacent to the competitive/lap pool this 30' x 30' raised temperature therapy pool must have direct access from the leased hospital space. Approximately 2,000 sq.ft.

3. Spa – An area of approximately 1,500 sq.ft. that has three massage/treatment rooms, retail sales area, beauty area, etc.

Outdoor Aquatic Center

The outdoor pool would have a water surface area of approximately 15,000 sq.ft. that includes a pool that is a 6 lane, 25 meter lap pool and a leisure pool with a large zero depth entry, a 2 slide tower, lazy river, interactive play features and other amenities.

A large deck space and fenced in grass area needs to be included along with extensive shade structures. The bath house should be approximately 6,000 sq.ft. and include a directors office (150 sq.ft.), lifeguard office (200 sq.ft.), first aid room (100 sq.ft.), locker rooms (3,000 sq.ft.), family change rooms (800 sq.ft.), concessions (800 sq.ft.), entry/fee desk (300 sq.ft.) and storage (400 sq.ft.).

The aquatic center is estimated to require up to 500 parking spaces.

Upper St. Clair Recreation Center Program Plan

Recreation Center

Component	Quantity	Square Footage	Total
Support Spaces			
Vestibule	1	200	200
Lobby	1	2,000	2,000
Front Desk	1	300	300
Public Restrooms	2	400	800
Vending	1	100	100
Custodial Closets	3	64	192
Maintenance Office	1	200	200
Sub Total		3,264	3,792
Office Space			
Entry	1	100	100
Office Manager	1	100	100
Director Office	1	150	150
Manager Office	1	150	150
Program Coordinators	3	120	360
Marketing Coor.	1	120	120
Work Stations	3	80	240
Work Room	1	300	300
Counting Room	1	64	64
Break Room	1	200	200
Conference Room	1	300	300
Storage	1	200	200
Sub Total		1,884	2,284
Activity Spaces			
Multipurpose Room	3	1,200	3,600
Multipurpose Storage	1	400	400
Multipurpose Stage	1	600	600
Kitchen	1	500	500
Childcare Area	1	950	950
Childcare Toilet	1	48	48
Childcare Storage	1	100	100
Sub Total		3,798	6,198
Page 1 Total		**8,946**	**12,274**

Component	Quantity	Square Footage	Total
Aquatics			
Leisure/Lap Pool	1	5,000	5,000
Deck Area	1	5,000	5,000
Pool Sup Office	1	120	120
Guard Office	1	200	200
Pool Filtration	1	600	600
Pool Storage	1	300	300
Sub Total		11,220	11,220
Aquatic Support			
Locker Rooms	2	1,500	3,000
Family Locker Rooms	8	150	1,200
Sub Total		1,650	4,200
Other			
Party Room	2	300	600
Party Room Storage	1	48	48
Gymnasium	1	13,000	13,000
Running/Jog Track	1	6,500	6,500
Gym Storage	1	400	400
Sub Total		20,248	20,548
Fitness			
Free Weight	1	2,000	2,000
Selectorized	1	4,000	4,000
Cardiovascular	1	6,000	6,000
Assessment Rooms	2	120	240
Wt./CV Storage	1	300	300
Group Fitness Room	1	2,000	2,000
Group Exer. Storage	1	250	250
Fitness Studio	1	1,000	1,000
Fitness Studio Storage	1	150	150
Sub Total		15,820	15,940
Page 1 Total		8,946	12,274
Net Building Area		57,884	64,182
Gross Building Area	25%	14,471	16,046
Total Building Area		**72,355**	**80,228**

Upper St. Clair Recreation Center Program Plan

Optional Spaces

Component	Quantity	Square Footage	Total
Aquatics			
Competitive/Lap Pool	1	4,425	4,425
Deck Area	1	4,425	4,425
Seating	1	1,000	1,000
Pool Filtration	1	500	500
Pool Storage	1	300	300
Sub Total		10,650	10,650
Activity Spaces			
Senior Activity Area	1	1,500	1,500
Senior Provider Rooms	2	120	240
Teen/Game Room	1	1,500	1,500
Game Room Storage	1	100	100
Sub Total		3,220	3,340
Net Building Area		13,870	13,990
Gross Building Area	25%	3,468	3,498
Total Building Area		**17,338**	**17,488**

Upper St. Clair Outdoor Aquatic Center
Program Plan

Component	Quantity	Square Footage	Total
Aquatics			
Competitive/Lap Pool	1	5,000	5000
Deck/Grass Area	1	7,500	7500
Leisure	1	10,000	10,000
Deck/Grass Area	1	15,000	15,000
Sub Total		37,500	37,500
Aquatics Support Bldg.			
Directors Office	1	150	150
Lifeguard Office	1	200	200
First Aid Room	1	100	100
Locker Rooms	2	1,500	3000
Family Change Room	5	150	750
Entry Desk	1	300	300
Concessions	1	600	600
Concession Storage	1	200	200
Pool Storage	1	400	400
Sub Total		3,600	5,700
Other			
Pool Filtration	1	1000	1000
Pool Equip. Storage	1	300	300
Sub Total		1,300	1,300
Net Building Area		4,900	7,000
Gross Building Area	20%	980.00	1,400.00
Total Building Area		**5,880**	**8,400**

Section IV – Project Cost Estimate

The costs for constructing a new recreation center vary greatly from project to project. They can be dependent on project complexity, market conditions, site conditions, phasing, fees, and other factors. The costs are shown in February 2006 dollars.

Hard Construction Costs: Hard construction costs are the "brick and mortar' costs which represent the actual costs paid to contractors to construct the facility. These hard costs include the contractor's profit and overhead (related construction fees) and general conditions.

Probable Soft Costs: Many owners typically estimate soft costs at 25% times the construction costs which is a factor normal to projects of this type. Some owners budget as much as 35%. Soft costs typically include development costs, financing fees, professional A/E fees, insurance and legal fees, moveable furniture, furnishings, equipment, special owner/vendor supplied systems or equipment, computer and data equipment, telephone equipment, A/V tech systems, moving costs and other costs not directly related to the actual building construction.

Cost Estimate:

	Low	**High**
Probable Construction Cost-New Center $150-$190/SF (80,228 SF)	12,034,200	15,243,320
Probable Construction Cost-Indoor Pool Pool Slides/Play Equipment	700,000 300,000	775,000 400,000
Probable Construction Cost-Outdoor Aqua Ctr. – Pool Slides/Play Equipment	2,500,000 350,000	3,000,000 425,000
Probable Site Construction Costs-Boyce Mayview Site	500,000	800,000
Total Probable Construction Cost	16,384,400	20,643,520
Total Project Cost (30% for Soft Costs)	**$21,299,720**	**$26,836,576**
Optional Spaces		
Aquatics Competitive Pool/Support $150-$190/SF (13,313 SF)	1,996,950	2,529,470
Pool Area Pool Equipment/Score Board	600,000 60,000	700,000 125,000
Total Probable Project Cost (30% increase)	$3,454,035	$4,360,811
Activity Spaces – Seniors/Teen/Game Room $150-$190/SF (4,175 SF)	626,250	793,250
Total Probable Project Cost (30% increase)	$814,125	$1,031,225

Note: Cost estimates were provided by WTW Architects and Water Technology.

Section V – Recreation Center/Aquatic Center Operations Pro-Forma

Operating Expenditures

Expenditures have been formulated based on the costs that are usually included in the operating budget for an indoor recreation 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 other areas of the country. All expenses were calculated as accurately as possible, but actual costs may be more or less based on the final design, operational philosophy, and programming considerations adopted by staff. A cost scenario has been developed for the facility noted below.

Core Facility - Recreation center with a gymnasium, group fitness room, fitness studio, leisure pool w/lap lanes, weight/cardiovascular area, walk/jog track, party rooms, childcare room, multi-purpose rooms (with kitchen), lobby/lounge/vending area, locker rooms and administrative area. **Approximately 80,000 sq.ft.**

Outdoor Aquatic Center - Outdoor pool with a water surface area of approximately 15,000 sq.ft. that includes a pool that is a 6 lane, 25 meter lap pool and a leisure pool with a large zero depth entry, a 2 slide tower, lazy river, interactive play features and other amenities. There would also be a bath house attached.

Operation Cost Models:

Category	Rec. Center	Outdoor Aqua.
Personnel		
Full-time	568,350	-0-
Part-time	689,587	216,748
Total	$1,257,937	$216,748
Commodities		
Office supplies	8,000	500
Chemicals (pool/mech.)	18,000	11,000
Maint./repair/mat.	20,000	5,000
Janitor supplies	20,000	3,500
Rec. supplies	30,000	5,000
Uniforms	3,000	2,000

Category	Rec. Center	Outdoor Aqua.
Printing/postage	25,000	2,000
Resale items	7,000	3,000
Food (concessions)	0	50,000
Other	3,000	2,000
Total	$134,000	$84,000
Contractual		
Utilities* (gas & elec.)	320,000	50,000
Water/sewer	14,000	12,000
Insurance (prop.& liab.)	25,000	15,000
Communications (phone)	6,000	2,000
Contract services** (building custodial, etc.)	50,000	10,000
Rent equip.	5,000	1,000
Advertising	20,000	10,000
Training (staff time)	6,000	4,000
Conference	3,000	0
Dues & subscriptions	1,000	500
Trash Pick-up	4,000	1,000
Bank charges	15,000	3,000
Other	5,000	1,000
Total	$464,000	$109,500
Capital		
Replace. fund	$25,000	$5,000
Grand Total	**$1,880,937**	**$415,248**

Note: Line items not included in this budget are exterior site maintenance, and vehicle costs. These items are being paid from other central sources. No provision has been made for a manned concession operation.

* Rates are $4.00 sq.ft. It should be noted that rates for gas and electricity have been very volatile and could result in a substantially higher cost for utilities over time.

** Contract services cover maintenance contracts, control systems work, etc.

Staffing Levels:

Positions	Rec. Center	Outdoor Aqua.
EXISTING POSITIONS		
Recreation & Leisure Services Director	1	1
Recreation Program Coordinator	1	1
Office Manager	1	1
NEW FULL-TIME		
Facility Manager ($50,000)	1	0
Aquatics Supervisor ($45,000)	1	0
General Programs Coordinator ($42,000)	1	0
Fitness Coordinator ($42,000)	1	0
Building Maintenance Supervisor ($40,000)	1	0
Building Custodian ($25,000)	3	0
Marketing/Membership Services Coor. ($35,000	1	0
Front Desk Supervisor ($23,000)	2	0
Head Lifeguard ($23,000)	2	0
New Salaries	$421,000	0
Benefits (35% of salary)	$147,350	0
Total New Full-Time Personnel	$568,350	0
New F.T.E. (full-time equiv.)	13	0

Note: Pay rates were determined based on Upper St. Clair's job classifications and wage scales. The positions listed are necessary to ensure adequate staffing for the center's operation. **The wage scales for both the full-time and part-time staff positions reflect an anticipated wage for 2009.** It is assumed that the existing full-time staff salaries are coming from another account.

Positions	**Rec. Center**	**Outdoor Aqua.**
PART-TIME		
Front Desk Supervisor ($10.00hr.)	21hrs/wk	-0-
Front Desk Attendant ($9.00hr.)	131hrs/wk	-0-
Lifeguard ($9.50hr.)	320hrs/wk	-0-
Gym Attendant* ($9.00hr.)	37hrs/wk	-0-
Weight Room Attendant ($9.00hr.)	202hrs/wk	-0-
Custodian ($12.00hr.)	116hrs/wk	-0-
Babysitter ($9.00hr.)	102hrs/wk	-0-
Outdoor Aquatic Center (14 weeks)		
Aquatic Center Manager ($10.50hr.)	-0-	63hrs/wk
Head Lifeguard ($10.00hr.)	-0-	126hrs/wk
Cashier ($9.00hr.)	-0-	126hrs/wk
Concession Supervisor ($10.00hr.)	-0-	63hrs/wk
Concession Attendant ($9.00hr.)	-0-	189hrs/wk
Lifeguard ($9.50hr.)	-0-	834hrs/wk
Building Attendant ($9.00hr.)	-0-	28hrs/wk
Program instructors**		
Aquatics ($10.00hr.)	$39,650	$4,600
General (rates vary)	$133,625	-0-
Salaries	$626,897	$197,044
Benefits (10% of wages)	$62,690	$19,704
Total Part-Time Salaries	$689,587	$216,748

* Position (and hours) is six months (26 weeks) only, due to heavier use of the facility during the winter months.

** 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. General programs consist of fitness, sports leagues, birthday parties, youth camps, general interest classes and other misc. programs. Aquatics includes learn to swim, aqua fitness, and other classes.

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 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. All revenues were calculated using a reasonably conservative approach.

Revenue Projection Models:

Category	Rec. Center	Outdoor Aqua.
Fees		
Indoor		
Daily Admissions	219,420	0
3 Month Passes	75,986	0
Annuals*	1,332,563	0
Corporate/Group	10,000	10,000
Rentals**	65,500	13,200
Sub-Total	$1,703,469	$23,200
Outdoor		
Admissions	0	164,565
Season Passes	0	179,256
Sub-Total	0	$343,821
Programs***		
Aquatics (indoor)	60,000	0
Aquatics (outdoor)	0	7,000
General	200,000	0
Contract classes/services	5,000	500
Total	$265,000	$7,500

Category	**Rec. Center**	**Outdoor Aqua.**
Other		
Resale items	10,500	4,500
Locker	0	2,000
Spec. events	3,000	3,000
Concessions (gross)	0	95,000
Vending (20% of gross)	10,000	2,000
Babysitting	26,000	0
Misc.	4,000	1,000
Total	$53,500	$107,500
Grand Total	**$2,021,969**	**$458,821**

* Figures are based on an active program to promote the sale of 3 month, annual and season passes.

** Rental numbers are based on the following:
Recreation Center
Group Ex/meeting room- $35/hr. x 1 hrs/wk x 50 wks= $1,750
Fitness Studio- $25/hr. x 1 hrs/wk x 50 wks= $1,250
Community room (non-prime)- $45/hr. x 2hrs/wk x 50 wks= $4,500
Community room (prime)- $450/4hrs. x 2/wk x 36 wks= $32,400
Kitchen- $75/event x 75= $5,625
Gym- $60/hr. x 2 hrs/wk x 24 wks= $2,880
Gym- $100/hr. x 2 hrs/wk x 24 wks= $4,800
Full Facility- $1,200/hr. x 5hrs/yr= $6,000
Leisure Pool- $125/hr. x 1 hr/wk x 50wks= $6,250
Outdoor Aquatic Center
Lap Pool- $30 per hour x 10 hrs/wk x 16 weeks)= $4,800
Leisure Pool- $150 x 4 hrs x 14 wks= $8,400

*** Figures are based on assessing fees that are at least 50% higher than the total cost of operating the program. General programs consist of fitness, instructional classes and sports programs. Aquatics includes learn to swim, aqua fitness, and other programs.

Note: No revenue has been shown from community organization use of the center, although it is expected that these groups will be charged for facility usage at the established rate.

Expenditure - Revenue Comparison

Category	Rec. Center	Outdoor Aqua.
Expenditures	$1,880,937	$415,248
Revenues	$2,021,969	$458,821
Difference	+141,032	+$43,573
Recovery %	107%	110%

It should be noted that the financial performance of an outdoor aquatic center is directly related to the weather. A very warm, dry summer will result in higher revenues while a wet cool season will greatly impact attendance and revenues. This pro-forma is based on an average summer season.

Impact of Other Facility Options:

Competitive Pool – The addition of this element would require an overall subsidy of approximately $75,000 to $100,000 per year.

Senior Activity Area – The addition of this space would require an overall of subsidy of approximately $35,000 to $50,000 per year.

Teen/Game Room – The addition of this space would require an overall subsidy of approximately $45,000 to $60,000 per year.

Future Years: Expenditure - Revenue Comparison: Expenses for the first year of operation of the center should be slightly lower than projected with the facility being under warranty and new. 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.

This operations pro-forma was completed based on the best information available and a basic understanding of the project but without the benefit of a concept plan for the center. However, 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.

Fees and Attendance

Projected Fee Schedule: The fee schedule has been figured utilizing an approximate 25% fee differential between township residents and non-residents. Revenue projections and attendance numbers were calculated from this fee model.

Recreation Center

Category	Daily		3 Month		Annual		(Monthly)	
	Res.	N Res.	Res.	N Res.	Res.	N Res.	Res.	N Res.
Adults	$8.00	$10.00	$185.00	$230.00	$500.00	$625.00	($42	$52)
Youth (5-17yrs.)	$6.00	$7.50	$55.00	$70.00	$150.00	$190.00	($13	$16)
Senior (65+)	$7.00	$9.00	$130.00	$160.00	$350.00	$435.00	($30	$37)
Household*		N/A	$335.00	$415.00	$900.00	$1,125.00	($75	$94)

* Includes 2 adults and up to 3 youth, each additional adult would be $350 and each additional youth would be $75.

Corporate
10% discount 5 or more mult./annuals
15% discount 10 or more mult./annuals
20% discount 15 or more mult./annuals

Rentals
$35/hr group exercise room
$25/hr fitness studio
$20/hr party room
$45/hr community room (per section, non-prime time)
$450/4hr multi-purpose (all sections, 4 hour minimum, prime time)
$75/event kitchen
$60/hr 1/2 gym
$100/hr full gym
$1,200/hr full facility (after hours only)

Pool
$125/hr (0-50 persons)
$175/hr (51-100 persons)
$225/hr (101-150 persons)

Baby-sitting $3.00/per hour

<u>Exercise Classes</u> (Drop-in Rates)

Individual	$8.00
Senior	$7.00

Note: Annual passes require a monthly automatic withdrawal option from the holder's bank account to encourage sales.

Outdoor Aquatic Center Only (summers only)

Category	Daily		Season Pass	
	Res.	N Res.	Res.	N Res.
Adult	$6.00	$7.50	$125.00	$155.00
Youth (5-17)	$5.00	$6.25	$95.00	$120.00
Senior (65+)	$5.50	$7.00	$105.00	$130.00
Family*		N/A	$200.00	$250.00

* Includes 2 adults and up to 3 youth, each additional annual pass holder is $25 for a youth/senior and $75 for an adult.

Outdoor Pool (per tank)
$150/hr (0-50 persons)
$175/hr (51-100 persons)
$200/hr (101-150 persons)

Swim Team
$30/hr. or $5 per lane hour

Note: It is anticipated that annual pass holders will be eligible for a substantial discount on the season pass rate.

Admission Rate Comparisons: The above rates were determined based on the competition in the area (public, non-profit and private) and the rates paid at similar facilities in other areas of Pennsylvania. The rates paid for other recreational activities in the Upper St. Clair Township area were also considered when establishing these rates. For comparison, the rates for some of the providers in the area are listed below.

Indoor Sports Fitness and Recreation Facilities (all rates are 2005)

Jewish Community Center-South Hills

	Full Payment	Monthly
Family	$745	$65
Single Parent Fam.	$525	$45.75
Individual	$525	$45.75
Senior	$280	$24.75
Senior Couple	$400	$35.25

St. Clair Fitness and Racquet Club

Gold Memberships – all center access

	Application Fee	Monthly
Yearly		
Single	$99	$60
Spouse	$99	$40
Family	$99	$100
6 Month		
Single	$99	$70
Spouse	$99	$45

Healthtrax Fitness & Wellness

	Enrollment Fee	Monthly
Individual	$49-$175	$69
Family of 2	$49-$225	$113
Family of 3+	$49-$235	+$28 each

Prepayment is 11 months x the monthly fee.

Cameron Wellness Center

	Initiation Fee	Monthly
Regular		
Individual	$250	$57
Couple	$360	$94
Senior 65+		
Individual	$180	$50
Couple	$260	$86
Family Add On (ages 15-21)		
Each Individual	$70	$34
Daily Fee		
Member	$10	
Non-member	$15	

Alexander's Athletic Club

	Enrollment Fee	Monthly
Individual	$99	$49

Health Club at South Pointe

	Enrollment Fee	Monthly
Individual	$0	$49

Outdoor Aquatic Centers (all rates are for 2005)

Cranberry Township Water Park

	Resident/May 1	Non-resident/May 1
Individual	$100	$125
Family of 2	$150	$200
Family of 3	$200	$250
Family of 4	$225	$300
Family of 5+	$260	$330
Senior	$75	$90
Senior (2)	$125	$160
Daily		
Individual	$5.00	$7.00

Bower Hill Swim Club

$50 fee to join plus $395/year. Also a $350 bond that is refundable upon termination.

Woodland Hills Club

$325/year

Dormont

	Season	Daily
Family	$125	0
Adult	$60	$3.50
Junior (6-14)	$45	$3.00

Mt. Lebanon

	Season	Daily
Family	$200	0
Adult	$65	$5.00
Student (4-18)	$55	$4.00

South Park

	Season	Daily
Family	$110	0
Adult	N/A	$4.00
Youth (6-12)	N/A	$3.00
Youth (5-)	N/A	$1.00

South Hills YMCA Swim Center

	Full Family	One Adult	One Teen
Capital Fee (one time)	$300	$150	$100
Membership (annual)	$78	$29	$24
Operating Fee (annual)	$370	$155	$100

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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 for residents and non-residents, 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 other areas of the country. These are averages only and the yearly figures are based on 360 days of operation for the recreation center and 90 for the outdoor aquatic center.

Yearly Paid admissions	**Rec. Center**	**Outdoor Aqua.**
Daily	27,000	27,000
(# daily admiss.)	75	300
3 Month	6,500	
(# sold annually)	250	0
Annual*	189,280	27,300
(# sold annually)	1,820	910
Total Yearly	222,780	54,300
Total Daily	619	603

* Admissions for pass holders were figured based on 26 admissions 3 months and 104 visits per year for an annual. Admissions for season pass holders are based on 30 visits a season.

The number of annual passes sold for the recreation center is based on capturing 10% of the households in the township, 4% in the primary service area, and only ½ of 1% of households in the secondary service area. The numbers for 3 month, and daily passes are based on known industry averages from other facilities, the amenities expected to be contained in the center, the fees being charged and the competition in the area.

The number of season passes sold for the outdoor aquatic center is based on selling passes to approximately 5% of the households in the township, 2.5% in the primary service area and 1/4 of 1% of the households for annual passes.

All family admissions are counted as one admission.

Note: Attendance for other events, programs, and spectator functions is more difficult to predict but a best guess estimate is approximately 2.5 times the number of paid admissions. Recreation centers are traditionally the busiest from November to March and mid-June to mid-August and are slow from April to early June and again from mid-August to the end of October. Weekdays between the hours of 5pm and 8pm are the busiest times of the week and weekends are also very busy during the winter months. In contrast mid-morning and early afternoon on weekdays are usually slow as well as weekends during the summer months (especially Sundays).

Hours of Operation: The projected hours of operation of the recreation center are as follows:

Monday - Friday	6:00am to10:00pm
Saturday	7:00am to 8:00pm
Sunday	Noon to 8:00pm

Hours per week: 101

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.

The projected hours of operation of the outdoor **aquatic center** are as follows:

Monday - Sunday	12:00pm to 8:00pm

Hours per week: 56

It is anticipated that the outdoor aquatic center would be open for lessons prior to noon on weekdays and time after hours would also be available for rentals.

Section VI - Project Recommendations

The following section details specific recommendations for the Upper St. Clair Recreation Center and outdoor aquatic center project. Remarks are grouped by areas of interest.

Programs and Facilities: The design, image and quality of the recreation center has a direct impact on its ability to attract and keep customers. Thought should be given to the building layout as it pertains to crowd 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 community 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 St. Clair Township the most for its money and the user a sense of quality and value.

<u>Pool</u>**-** 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 recreation center that is being built in most settings should include a swimming pool as part of its facility components. Without 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 pools design has proved to be extremely popular for the drop-in user. The age of the conventional pool in most recreational settings is nearly dead. 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. It is estimated conservatively that a leisure pool can generate up to 30% more revenues than a comparable conventional pool. While the cost of operating such a pool can be high the revenue potential more than makes up for this differential. 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 pool in a recreation center will drive the use and ultimately the revenue in the other areas of the center. It is estimated that a 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.

The same issues are also present for an outdoor aquatic center where the key element is an even more diverse leisure pool.

<u>Programs</u>- Special events are an important aspect of any facility but they are difficult to base consistent revenue on. They can be very disruptive to users and care must be taken to evaluate the benefits and problems caused by such activities. The revenues generated from these programs are not always worth the time and effort to put them together. 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 school district, community, businesses, and other institutions should be identified and integrated into the operations plan for this facility.

The success of indoor recreation centers is dependent on developing a broad based appeal to 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. The needs of the business community must also be considered if this market is to be developed and served.

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 back to the center and the township (at least 30%).

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 pools, gyms, weight/fitness areas and jogging track 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 daily use and 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 balance between drop in use and programmed activities. A goal of consistently covering 100% of operational expenses with revenues should be attainable but there is virtually no possibility of recovering all capital debt through facility revenues. It must be realized that most of the recreation centers that have been built in the last ten years are not even covering their operating expenses with revenues. Maximizing revenue production should be a primary goal of the center. Care must be taken to make sure that a fees and charges policy is consistently followed. No form of revenue production should be given away. All uses by organized youth sports groups and other community organizations should include a market driven user fee (or rental fee) to help offset the cost of operating the center.

<u>Capital replacement fund</u>- A plan for funding a capital replacement program should be developed before the center opens. The American Public Works Association recommends between 2% and 4% of replacement cost be budgeted annually for capital items.

<u>Fees</u>- The revenue projections were based on the concept of having a resident and non-resident rate. The difference between resident/non-resident fees is approximately 25%. A non-resident fee that is more than 25% tends to exclude these individuals from participating in the facility or its programs. With the residents of Upper St. Clair

Township comprising only about 36% of the primary service area population, 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 40% to 60% of all users could be non-residents of the township. 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. A method of combining program fees and drop in use allows an annual pass holder to purchase a "fitness rider" for $150.00, which gives them unlimited access to any fitness class during the time their pass is valid. Some centers actually include "free" fitness classes as part of the benefits of having an annual pass. Other centers give a discount to all annual pass holders (usually 15% to 20%) for programs and services. A similar rider may need to be developed for drop-in baby-sitting and/or a baby-sitting punch card introduced. 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 pool, 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. An established criteria such as eligibility for the school lunch program or food stamps should be utilized to determine need rather than spending the time and aggravation of developing and administering a new system.

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 nearly impossible 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.

<u>Pre-selling annual passes</u> – Approximately 3 to 6 months before the center opens there must be a program in place to begin the pre-sale of "charter passes" with a savings incentive to promote sales. A goal should be to pre-sell between 25% and 50% of all budgeted passes prior to opening the center.

<u>Marketing plan</u>- A marketing plan for the facility and its programs 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 Facility Manager to guide all marketing efforts. This plan should be updated yearly. Special emphasis must be placed on promoting the sale of annual passes to establish a strong revenue base. The business market should also be a major focus of the marketing effort as well.

Partnerships- Developing possible partnerships with other neighboring communities and/or the school district should be thoroughly explored. Such partnerships could significantly strengthen the market for the recreation center (as well as the outdoor aquatic center) and provide a solid consistent revenue stream for the facility.

Recreation Center and Outdoor Aquatic Center – It is highly likely that both the recreation center and the outdoor aquatic center will be built at the same site but they may not necessarily be physically connected. However the two facilities should be managed and operated as one center with shared staff and resources whenever possible. In addition the two facilities should also be marketed together with a significant fee savings for recreation center annual pass holders who wish to purchase a season pass to the outdoor aquatic 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 center and then having to come back and ask for 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 center. An emphasis needs to be placed on the importance of image and customer service in all training programs.

The key to opening a recreation center and have it operate smoothly is hiring the necessary staff well in advance and having them well organized, properly trained and comfortable with the buildings 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. The following are the suggested hiring dates for staff prior to the center's opening.

Position	Hire Date
Facility Manager -	12 months
Aquatics Supervisor -	6 months
Marketing Coordinator -	6 months
Maint. Supervisor -	5 months
Program Coordinators -	4 months
Custodians	1 month
Front Desk Supervisors -	1 month
Head Lifeguards -	1 month
Part time staff –	1 month

Section VII - Appendix

Part-Time Staff Hours

Revenue Worksheet

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 supervisors would handle 80 hours of the front desk schedule (split between evenings and weekends).

Time	Hours	Employees	Days	Total Hours Per Week
Gym Attendant				
Mon.-Fri.				
4pm - 9pm	5	1	5	25
Sat.-Sun.				
12pm - 6pm	6	1	2	12
Total				37 hours

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

Time	Hours	Employees	Days	Total Hours Per Week
Weight Room Attendant				
Mon.-Fri.				
6am – 8am	2	2	5	20
8am – 1pm	5	2	5	50
1pm – 4pm	3	2	5	30
4pm - 8pm	4	2	5	40
8pm – 10pm	2	2	5	20
Sat.				
7am – noon	5	2	1	10
12pm - 8pm	8	2	1	16
Sun.				
12pm - 8pm	8	2	1	16
Total				202 hours

Custodian/Bldg. Attendant

Mon.-Fri.				
8am – 4pm	8	1	5	40
4pm - 9pm	5	2	5	50
Sat.				
8am – 11am	3	1	1	3
11am – 3pm	4	1	1	4
3pm- 7pm	4	2	1	8
Sun.				
noon – 3pm	3	1	1	3
3pm - 7pm	4	2	1	8
Total				116 hours

Baby-sitter

Mon.-Fri.				
8am - 1pm	5	2	5	50
4pm - 8pm	4	2	5	40
Sat.				
10am - 4pm	6	2	1	12
Total				102 hours

Pool Guards

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

Time	Hours	Guards	Days	Total Hours Per Week
Mon.-Fri.				
5:30am - 9am	3.5	1	5	17.5
9am - 1pm	4	2	5	40
1pm - 7pm	6	5	5	150
7pm - 10pm	3	3	5	45
Sat.				
6:30am - 9am	2.5	1	1	2.5
9am - 1pm	4	2	1	8
1pm - 6pm	5	5	1	25
6pm - 8pm	2	3	1	6
Sun.				
12pm - 6pm	6	5	1	30
6pm - 8pm	2	3	1	6
Total				330 hours

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

Time	Hours	Guards	Days	Total Hours Per Week
Mon.-Fri.				
5:30am - 8am	2.5	1	5	12.5
8am - 11:30am	3.5	2	5	35
11:30am - 1pm	1.5	2	5	15
1pm - 3pm	2	2	5	20
3pm - 8pm	5	5	5	125
8pm - 10pm	2	3	5	30
Sat.				
6:30am - 9am	2.5	1	1	2.5
9am - 1pm	4	2	1	8
1pm - 6pm	5	5	1	25
6pm - 8pm	2	3	1	6
Sun.				
12pm - 6pm	6	5	1	30
6pm - 8pm	2	3	1	6
Total				315 hours

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 size, 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 actual use patterns, the design of the pool and hours of operation.

Outdoor Aquatic Center –

Time	Hours	Employees	Days	Total Hours Per Week
Aquatic Center Manager (for 16 weeks)				
Mon.-Sun.				
11:00am – 8pm	9	1	7	63
Total				63 hours
Head Lifeguard (for 14 weeks)				
Mon.-Sun.				
11:00am-8pm	9	2	7	126
Total				126 hours
Cashier (for 14 weeks)				
Mon.-Sun.				
11am – 8pm	9	2	7	126
Total				126 hours
Concession Supervisor (for 16 weeks)				
Mon.-Sun.				
11am - 8pm	9	1	7	63
Total				63 hours
Concession attendant (for 14 weeks)				
Mon.-Sun.				
11am - 8pm	9	3	7	189
Total				189 hours

Lifeguard (for 14 weeks)

Mon.-Fri.				
8am – 11:30am	3.5	2	5	35
11:30am – 6pm	6.5	14	5	455
6pm – 8pm	2	9	5	90
Sat. & Sun.				
11:30am – 6pm	6.5	14	2	182
6pm – 8pm	2	9	2	36
Rentals	4hrs/wk	9		36
Total				834 hours

Building Attendant (for 14 weeks)

Mon.-Sun.				
6pm – 10pm	4	1	7	28
Total				28 hours

Program Staffing

Aquatics

Swim Lessons (instructors are paid $10.00 an hour classes are 30-45 minutes in length)

Summer- staff ($5.00/cl.)	12 classes/day 5 days	10 wks	$3,000
staff ($10.00/cl.)	6 classes/day 5 days	10 wks	$3,000
Spring/Fall- staff ($5.00/cl.)	6 classes/day 2 days	16 wks	$960
staff ($10.00/cl.)	2 classes/day 2 days	16 wks	$640
Winter- staff ($5.00/cl.)	6 classes/day 2 days	8 wks	$480
staff ($10.00/cl.)	2 classes/day 2 days	8 wks	$320
Total			$8,400

Private Swim Lessons

10 lessons/wk. ($15.00/less.)	45 wks	$6,750

Water Aerobics

Summer- staff ($20.00/cl.)	15 classes/wk	14 wks	$4,200
Spring/Fall- staff ($20.00/cl.)	12 classes/wk	26 wks	$6,240
Winter- staff ($20.00/cl.)	12 classes/wk	12 wks	$2,880
Total			$13,320

Other

Lifeguard Training			
1 staff ($20.00/cl.)	33 hours/sess.	3 sessions	$1,980
Therapy Classes			
1 staff ($20.00/cl.)	4 classes/wk	40 wks	$3,200
Misc.			
1 staff ($20.00/cl.)	6 classes/wk	50 wks	$6,000
Total			$11,180

Total Aquatics Programs	**$39,650**

Outdoor Aquatics Center

Swim Lessons (instructors are paid $10.00 an hour classes are 30-45 minutes in length)

Summer- staff ($5.00/cl.)	6 classes/day 5 days	10 wks	$1,500
staff ($10.00/cl.)	2 classes/day 5 days	10 wks	$1,000
Total			$2,500

Water Aerobics

Summer- staff ($20.00/cl.)	6 classes/wk	10 wks	$1,200

Private Swim Lessons

3 lessons/day ($15.00/less.)		10 wks	$450

Misc.

1 staff ($15.00/cl.)	3 classes/wk	10 wks	$450
Total Outdoor Aquatics Programs			**$4,600**

General Programs

Leagues (adult basketball & volleyball, youth indoor soccer)

Basketball				
MW	2 staff ($20.00/game)	6 games/wk	20 wks	$4,800
	1 staff ($9.00/game)	6 games/wk	20 wks	$1,080
Volleyball				
T Th	1 staff ($20.00/cl.)	6 games/wk	24 wks	$2,880
Indoor Soccer				
Su	2 staff ($20.00/game)	4 games/wk	10 wks	$1,600
	1 staff ($9.00/game)	4 games/wk	10 wks	$360
Total				$10,720

Fitness Classes (dry land)

MWF	2 staff ($20.00/cl.)	12 classes/wk	52 wks	$24,960
T Th	1 staff ($20.00/cl.)	10 classes/wk	52 wks	$10,400
Wknd	1 staff ($20.00/cl.)	6 classes/wk	52 wks	$6,240
Total				$41,600

Personal Trainer

2 staff ($35.00/sess.)	10 per week	52 wks	$36,400

Weight Training

1 staff ($20.00/cl.)	6 classes/wk	37 wks	$4,440

Wellness Classes

1 staff ($15.00/cl.)	6 classes/wk	37 wks	$3,330

Dance/Martial Arts Activities

1 staff ($10.00/cl.)	12 classes/wk	37 wks	$4,440

General Interest/Arts & Crafts

1 staff ($15.00/cl.)	12 classes/wk	37 wks	$6,660

Birthday Parties

1 staff ($15.00/party)	8/wk	52 wks	$6,240

Summer Camp Program

1 staff ($10.00/hr./8hrs)	5 days/wk	10 wks	$4,000
3 staff ($9.00/hr./8 hrs)	5 days/wk	10 wks	$10,800
Total			$14,800

Misc. (senior, teen, etc.)

1 staff ($15.00/cl.)	9 classes/wk	37 wks	$4,995
Total General Programs			**$133,625**

Note: Many 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. Figures do not include any existing programs or services currently being offered at other locations.

Revenue Worksheets:

Recreation Center

Daily

	Fee	# per day	Revenue		
Adult	$8.00	35	$280		
Youth	$6.00	30	$180		
Senior	$7.00	10	$70		
Total		75	$530 x 350 days =		$190,800

Non. Res. 60% of users with a 25% increase in revenues $28,620

Grand Total $219,420

3 Month Pass

	Fee	# sold	Revenue	
Adult	$185	65	$12,025	
Youth	$55	10	$550	
Senior	$130	25	$3,250	
Family	$335	150	$50,250	
Total		250	$66,075	$66,075

Non.Res. 60% of users with a 25% increase in revenues $9,911

Grand Total $75,986

Yearly Pass

	Fee	# sold	Revenue	
Adult	$500	550	$275,000	
Youth	$150	25	$3,750	
Senior	$350	200	$70,000	
Family	$900	900	$810,000	
Total		1,675	$1,158,750	$1,158,750
Non.Res. 60% of users with a 25% increase in revenues				$173,813
Grand Total				$1,332,563

Revenue Summary

Daily	$219,420
3 Month Passes	$75,986
Annual Passes	$1,332,563
Total	$1,627,969

Outdoor Aquatic Center

Daily

	Fee	# per day	Revenue	
Adult	$6.00	80	$298	
Youth	$5.00	200	$1,000	
Senior	$5.50	20	$110	
Total		300	$1,590 x 90 days =	$143,100

Non-Residents are 60% of users with a 25% increase in revenues $21,465

Grand Total $164,565

Season Pass

	Fee	# sold	Revenue
Adult	$125	75	$9,375
Youth	$95	150	$14,250
Senior	$105	50	$5,250
Family	$200	635	$127,000
Total		910	$155,875

Non-Residents are 60% of users with a 25% increase in revenues $23,381

Grand Total $179,256

Revenue Summary

Daily	$164,565
Season Passes	$179,256
Total	$343,821

Note: These work sheets were used to project possible revenue sources and amounts. These figures are estimates only, based on very 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.