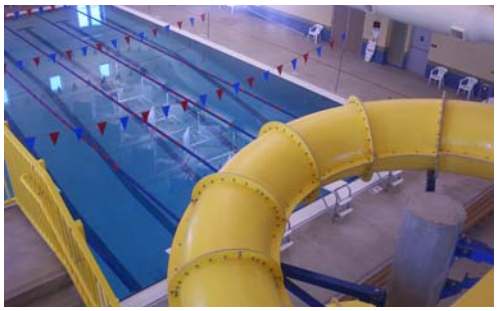
Feasibility Study and Economic Impact Analysis for a Multi-Sports Recreational Complex in the Helena Area

Final Report
September 20, 2017



BARKER RINKER SEACAT ARCHITECTURE

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This project was funded in part by an award from the Big Sky Economic Development Trust Fund.

Section I – Market Analysis

Ballard*King & Associates has been tasked with completing a feasibility study for the Helena Regional Sports Association for a proposed indoor Multi-Sport Recreation Complex to be built in the Helena, Montana area.

Demographics

The following is a summary of the demographic characteristics of the service areas along with recreation and leisure participation standards as produced by the National Sporting Goods Association (NSGA), also included in participation information provided by the National Endowment of the Arts (NEA).

B*K accesses demographic information from Environmental Systems Research Institute (ESRI) who utilizes 2010 Census data and their own demographers for 2015-2020 projections. In addition to demographics ESRI also provides data on housings, recreation and entertainment spending and adult participation in activities. All of this data helps describe the community around the proposed complex.

Service Areas: The primary service area consists of the greater Helena area. A secondary service area has also been identified and it includes a very large geographic area that stretches from nearly Great Falls to Butte.

Primary Service Areas are defined as the distance people will travel on a regular basis (a minimum of once a week) to utilize a facility or its programs. Use by individuals outside of this area will be much more limited and will focus more on special activities or events (tournaments, etc.).

Service areas can vary in size with the types of components in the facility. A center with active elements (pool, weight cardiovascular equipment area, gym, track, etc.) will have a larger service area than a more passively oriented facility. Specialized facilities such as a competitive aquatic venue will have a bigger service area, making it more of a regional destination.

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

Table A – Service Area Comparison Chart:

	Primary Service Area	Secondary Service Area
Population:		
2010 Census	64,128[1]	85,913[2]
2015 Estimate	66,991	89,656
2020 Estimate	69,851	93,342
Households:		
2010 Census	26,535	35,896
2015 Estimate	28,112	38,006
2020 Estimate	29,465	39,779
Families:		
2010 Census	16,882	23,213
2015 Estimate	17,721	24,357
2020 Estimate	18,472	25,355
Average Household Size:		
2010 Census	2.35	2.33
2015 Estimate	2.32	2.30
2020 Estimate	2.31	2.29
Ethnicity (2015 Estimate):		
Hispanic	3.0%	2.9%
White	92.8%	93.3%
Black	0.9%	0.7%
American Indian	2.1%	2.0%
Asian	0.8%	0.6%
Pacific Islander	0.1%	0.1%
Other	0.6%	0.6%
Multiple	2.8%	2.6%
Median Age:		
2010 Census	40.5	42.4
2015 Estimate	41.4	43.6
2020 Estimate	41.7	44.2
Median Income:		
2015 Estimate	$57,459	$54,678
2020 Estimate	$66,700	$62,894

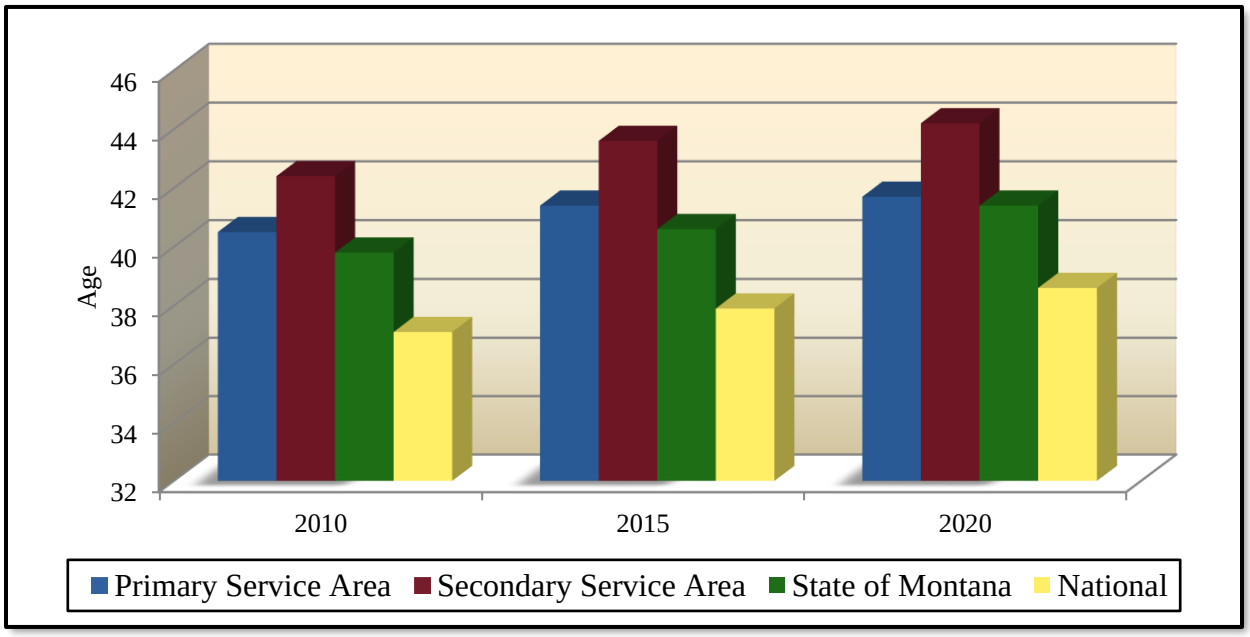
[1] From the 2000-2010 Census the Primary Service Area experienced a 15.0% increase in population.
[2] From the 2000-2010 Census Secondary Service Area experienced a 12.8% increase in population.

Age and Income: It is important to compare the median age and median household income levels to the national levels. Age and income are primary determiners of participation in recreation activities. The lower the median age, the higher the participation rates are for most activities. The level of participation also increases as the median income level goes up.

Table B – Median Age:

	2010 Census	2015 Projection	2020 Projection
Primary Service Area	40.5	41.4	41.7
Secondary Service Area	42.4	43.6	44.2
State of Montana	39.8	40.6	41.4
Nationally	37.1	37.9	38.6

Chart A – Median Age:



The median age in the State of Montana is higher in comparison to the U.S. The median age in the Primary Service Area is higher than the State and the Secondary Service Area is higher than the Primary. A higher median age points to service areas with older individuals (retirees) and families with older children.

Households with Children: The following chart provides the number of households and percentage of households in the Primary Service Area and the Secondary Service Area with children.

Table C – Households w/ Children

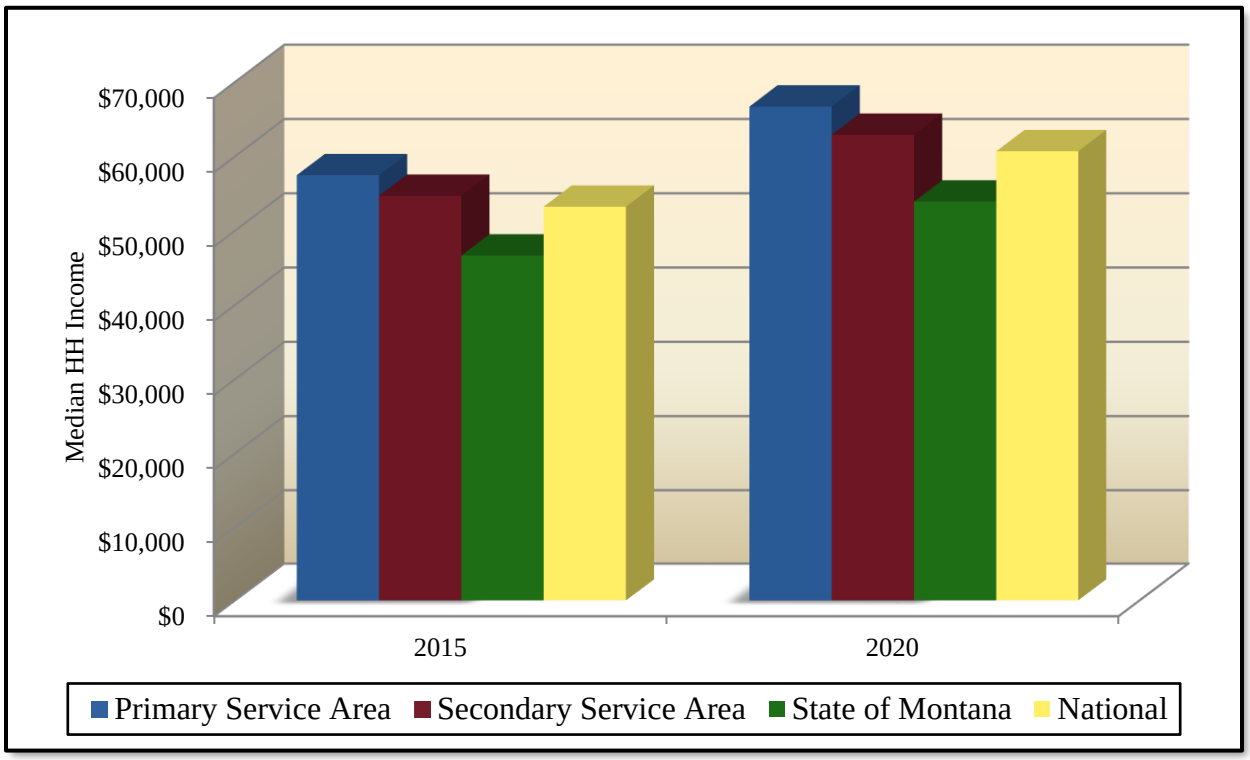
	Number of Households w/ Children	Percentage of Households w/ Children
Primary Service Area	7,890	29.7%
Secondary Service Area	10,210	28.4%

The information contained in Table-C helps further outline the presence of families with children.

Table D – Median Household Income:

	2015 Projection	2020 Projection
Primary Service Area	$57,459	$66,700
Secondary Service Area	$54,678	$62,894
State of Montana	$46,649	$53,906
Nationally	$53,217	$60,683

Chart B – Median Household Income:



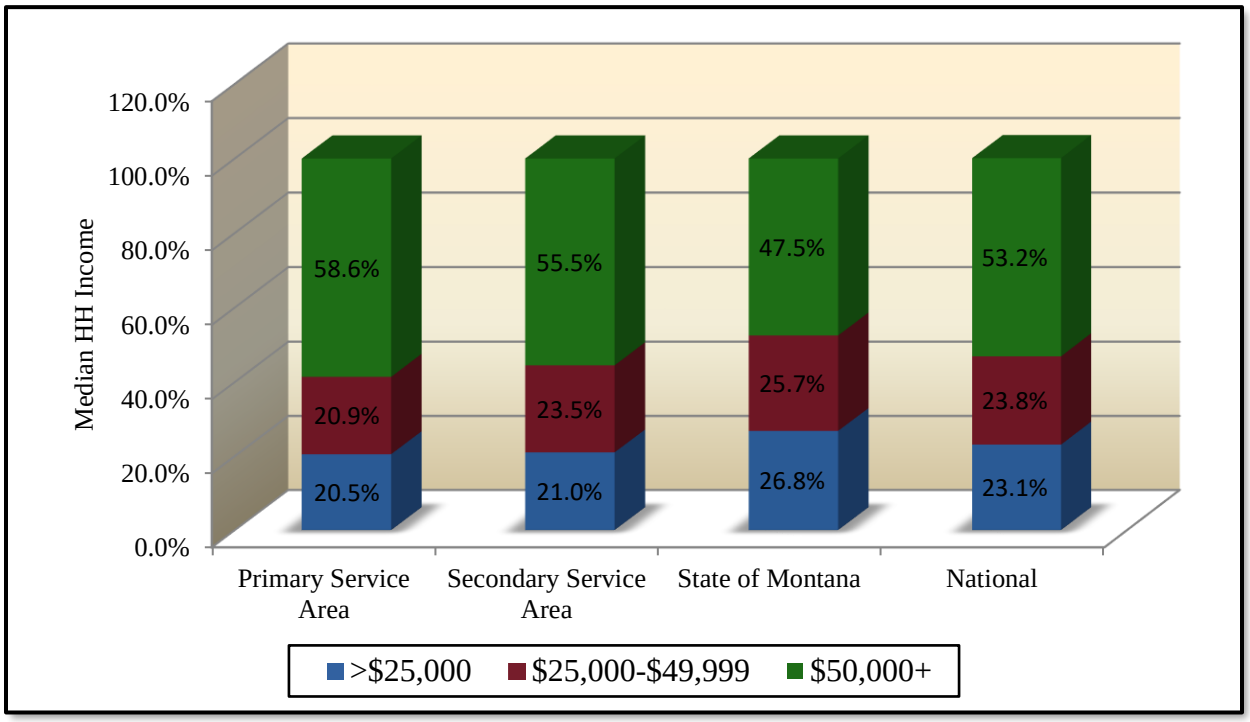
Based upon 2015 projections for median household income the following narrative is available:

In the Primary Service Area, the percentage of households with median income over $50,000 per year is 58.6% compared to 53.2% on a national level. Furthermore, the percentage of the households in the service area with median income less than $25,000 per year is 20.5% compared to a level of 23.1% nationally.

In Secondary Service Area, the percentage of households with median income over $50,000 per year is 55.5% compared to 53.2% on a national level. Furthermore, the percentage of the households in the service area with median income less than $25,000 per year is 21.0% compared to a level of 23.1% nationally.

The median income in the State of Montana is less than the National number. The median income in the Secondary Service Area is slightly higher than the national number with the Primary Service Area being greater than the Secondary. The income level must be balanced with the overall cost of living to determine ability to pay for entertainment and recreation services.

Chart C – Median Household Income Distribution



Household Budget Expenditures: In addition to studying Median Age and Median Income, it is important to examine Household Budget Expenditures. In particular, looking at housing information; shelter, utilities, fuel and public services along with entertainment & recreation can provide a snapshot into the cost of living and spending patterns in the services areas. The table below looks at that information and compares the service areas.

Table E – Household Budget Expenditures[3]:

Primary Service Area	SPI	Average Amount Spent	Percent
Housing	95	$20,424.97	29.8%
Shelter	*95*	*$15,579.65*	*22.8%*
Utilities, Fuel, Public Service	*96*	*$4,845.31*	*7.1%*
Entertainment & Recreation	95	$3,156.65	4.6%

Secondary Service Area	SPI	Average Amount Spent	Percent
Housing	90	$19,252.69	29.1%
Shelter	*88*	*$14,483.90*	*21.9%*
Utilities, Fuel, Public Service	*94*	*$4,768.79*	*7.2%*
Entertainment & Recreation	94	$3,100.16	4.7%

State of Montana	SPI	Average Amount Spent	Percent
Housing	81	$17,434.50	29.0%
Shelter	*79*	*$13,043.73*	*21.7%*
Utilities, Fuel, Public Service	*87*	*$4,390.75*	*7.3%*
Entertainment & Recreation	85	$2,820.38	4.7%

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

Average Amount Spent: The average amount spent per household.

Percent: Percent of the total 100% of household expenditures.

Note: Shelter along with Utilities, Fuel, Public Service are a portion of the Housing percentage.

[3] Consumer Spending data are derived from the 2004 and 2005 Consumer Expenditure Surveys, Bureau of Labor Statistics. ESRI forecasts for 2015 and 2020.

Chart D – Household Budget Expenditures Spending Potential Index:

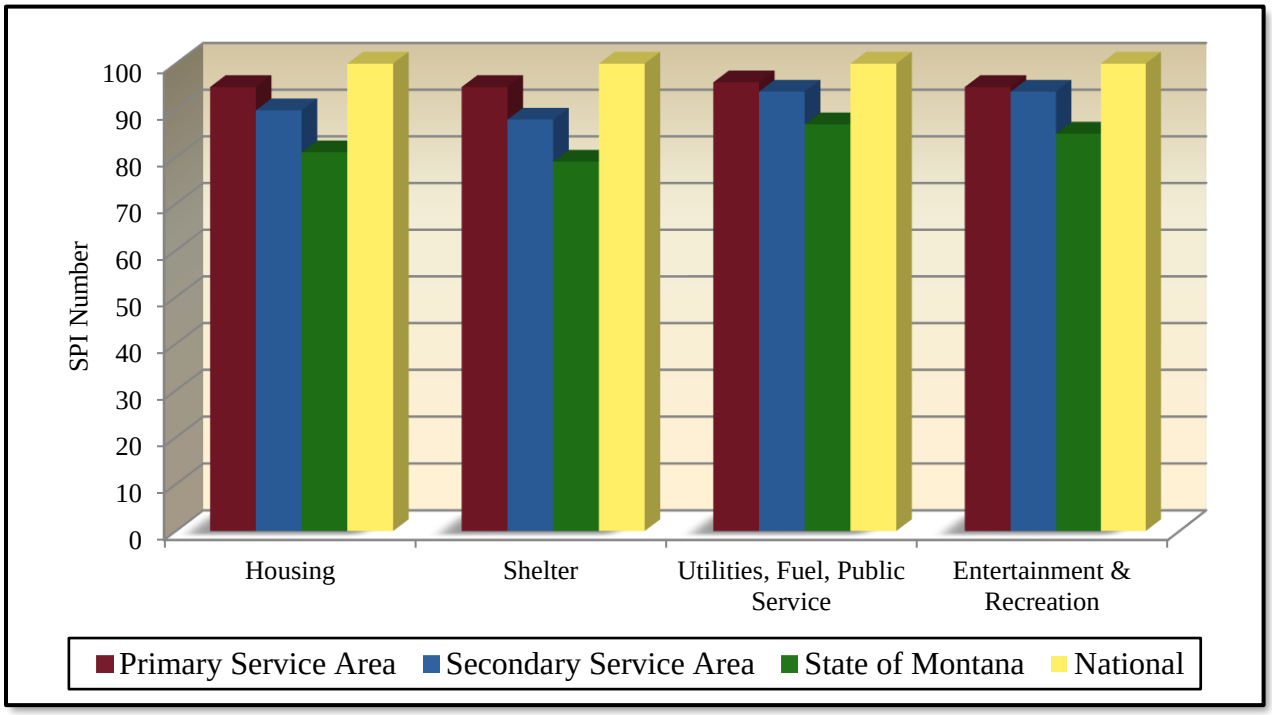


Chart D, illustrates the Household Budget Expenditures Spending Potential Index in the service areas. The SPI follows a consistent pattern with median household income.

Further Narrative on Housing:

The total number of housing units in the Primary Service Area, according to the 2010 Census, is 28,301 and 93.8% of those are occupied, or 26,535 housing units. Of the available units the bulk are for seasonal/recreation/occasional use, 2.4%.

The total number of housing units in Secondary Service Area, according to the 2010 Census, is 41,763 and 86.0% of those are occupied, or 35,896 housing units. Of the available units the bulk are for seasonal/recreational/occasional use, 9.4%.

Recreation Expenditures Spending Potential Index: Finally, through ESRI it is possible to examine the overall propensity for households to spend dollars on recreation activities. The following comparisons are possible.

Table F – Recreation Expenditures Spending Potential Index[4]:

Primary Service Area	SPI	Average Spent
Fees for Participant Sports	97	$117.12
Fees for Recreational Lessons	93	$114.45
Social, Recreation, Club Membership	97	$166.34
Exercise Equipment/Game Tables	92	$70.62
Other Sports Equipment	92	$7.36

Secondary Service Area	SPI	Average Spent
Fees for Participant Sports	87	$104.57
Fees for Recreational Lessons	83	$101.80
Social, Recreation, Club Membership	87	$148.68
Exercise Equipment/Game Tables	97	$74.80
Other Sports Equipment	102	$8.17

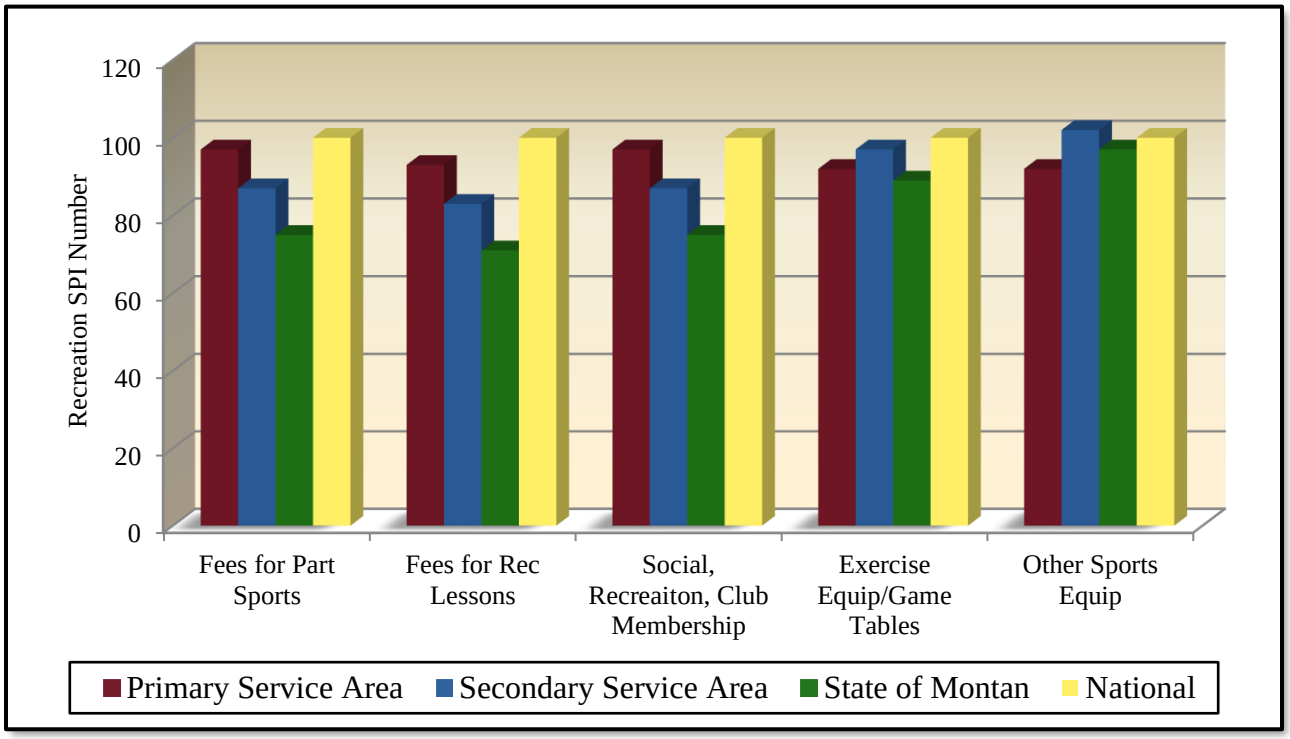
State of Montana	SPI	Average Spent
Fees for Participant Sports	75	$90.68
Fees for Recreational Lessons	71	$86.72
Social, Recreation, Club Membership	75	$129.08
Exercise Equipment/Game Tables	89	$68.50
Other Sports Equipment	97	$7.73

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.

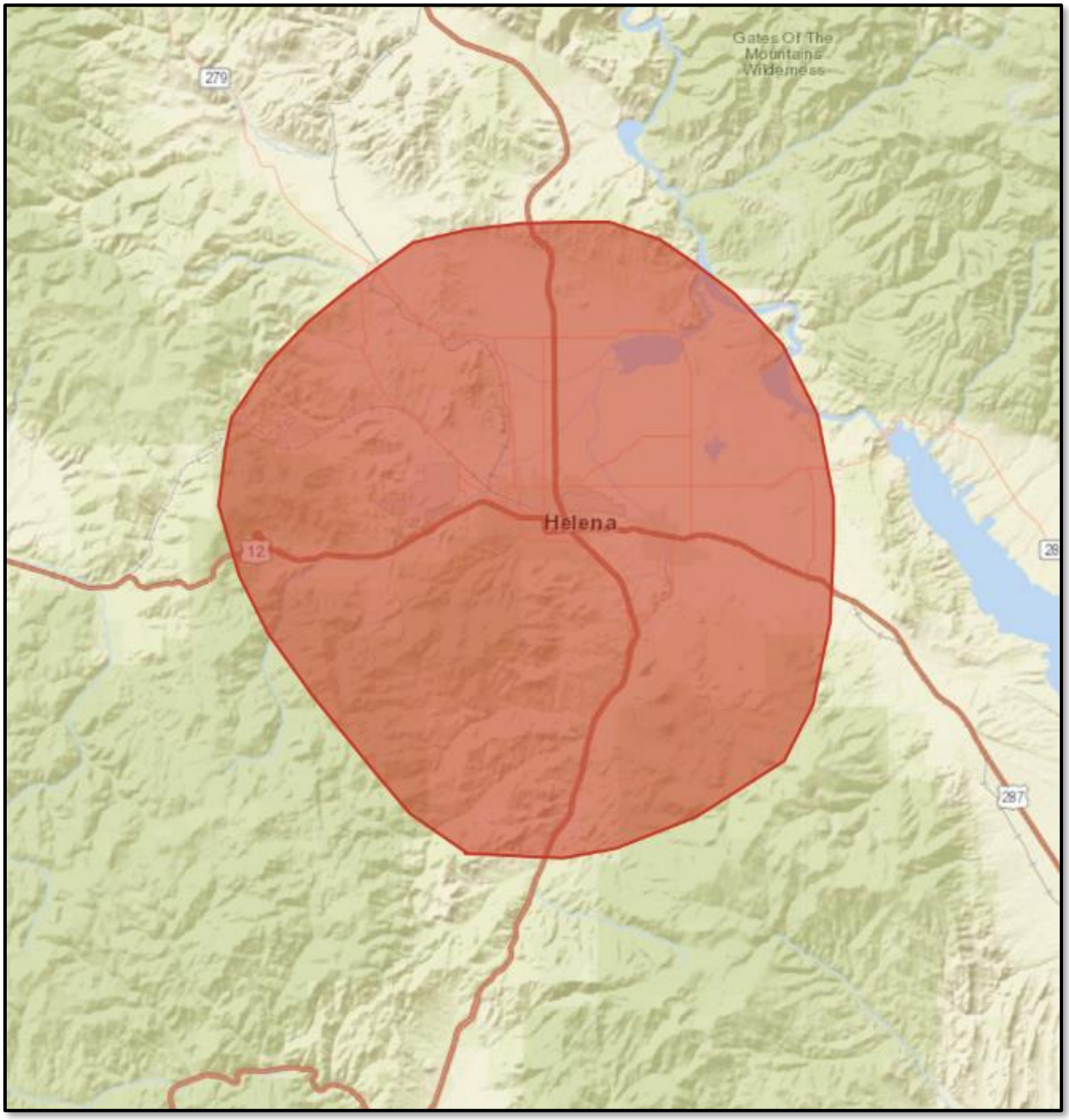
[4] Consumer Spending data are derived from the 2006 and 2007 Consumer Expenditure Surveys, Bureau of Labor Statistics.

Chart E – Recreation Spending Potential Index:



The Spending Potential Index for Recreation is very similar to the Household Budgetary Spending. It is also important to note that these dollars are currently being spent in the market.

Map A – Primary Service Area Map:



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

Table G – 2015 Primary Service Area Age Distribution
(ESRI estimates)

Ages	Population	% of Total	Nat. Population	Difference
-5	3,915	5.8%	6.3%	-0.5%
5-17	10,915	16.3%	16.6%	-0.3%
18-24	6,047	9.0%	10.1%	-1.1%
25-44	15,368	22.9%	26.1%	-3.2%
45-54	9,239	13.8%	13.4%	+0.4%
55-64	10,707	16.0%	12.8%	+3.2%
65-74	6,655	9.9%	8.6%	+1.3%
75+	4,146	6.2%	6.2%	+0.0%

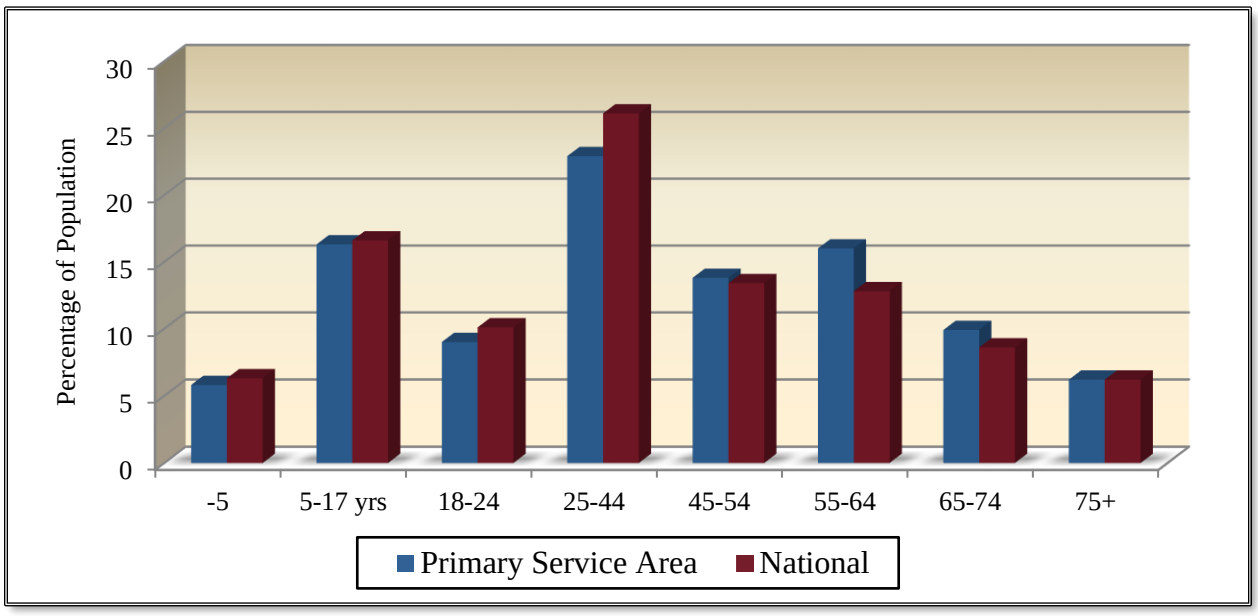
Population: 2015 census estimates in the different age groups in the Primary Service Area.

% of Total: Percentage of the Primary Service Area/population in the age group.

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

Difference: Percentage difference between the Primary Service Area population and the national population.

Chart F – 2015 Primary Service Area Age Group Distribution



The demographic makeup of the Primary Service Area, when compared to the characteristics of the national population, indicates that there are some differences with an equal or larger population in the 45-54, 55-64, 65-74 and 75+ age groups and a smaller population in the -5, 5-17, 18-24 and 25-44 age groups. The largest positive variance is in the 55-64 age group with +3.2%, while the greatest negative variance is in the 25-44 age group with -3.2%.

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

Table H – 2015 Primary Service Area Population Estimates
(U.S. Census Information and ESRI)

Ages	2010 Census	2015 Projection	2020 Projection	Percent Change	Percent Change Nat'l
-5	4,029	3,915	4,019	-0.2%	+0.3%
5-17	10,868	10,915	11,187	+2.9%	-0.7%
18-24	5,580	6,047	6,014	+7.8%	+1.7%
25-44	15,209	15,368	16,329	+7.4%	+7.1%
45-54	10,363	9,239	8,353	-19.4%	-9.7%
55-64	9,609	10,707	10,356	+7.8%	+17.4%
65-74	4,773	6,655	8,496	+78.0%	+50.1%
75+	3,694	4,146	5,097	+38.0%	+22.0%

Chart G – Primary Service Area Population Growth

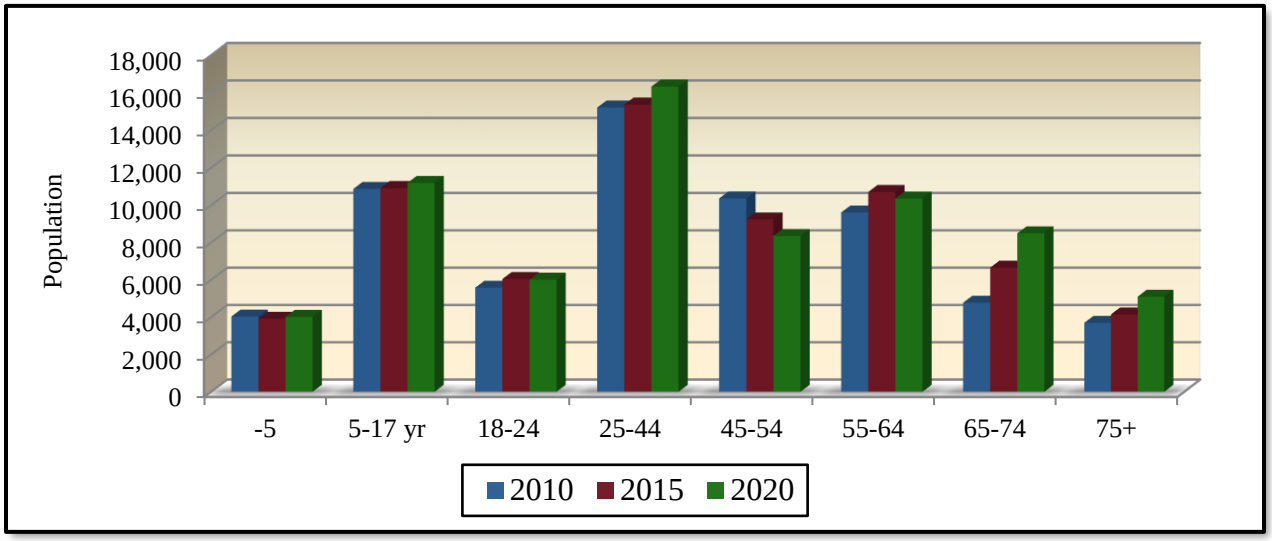


Table H, illustrates the growth or decline in age group numbers from the 2010 census until the year 2020. It is projected that six of eight age groups will experience an increase, with -5 and 45-54 experiencing a decrease. It must be remembered that the population of the United States as a whole is aging and it is not unusual to find negative growth numbers in the younger age groups and significant net gains in the 45 plus age groupings in communities which are relatively stable in their population numbers.

Ethnicity and Race: Below is listed the distribution of the population by ethnicity and race for the Primary Service Area for 2015 population projections. Those numbers were developed from 2010 Census Data.

Table I – Primary Service Area Ethnic Population and Median Age 2015
(Source – U.S. Census Bureau and ESRI)

Ethnicity	Total Population	Median Age	% of Population	% of MT Population
Hispanic	2,030	22.4	3.0%	3.6%

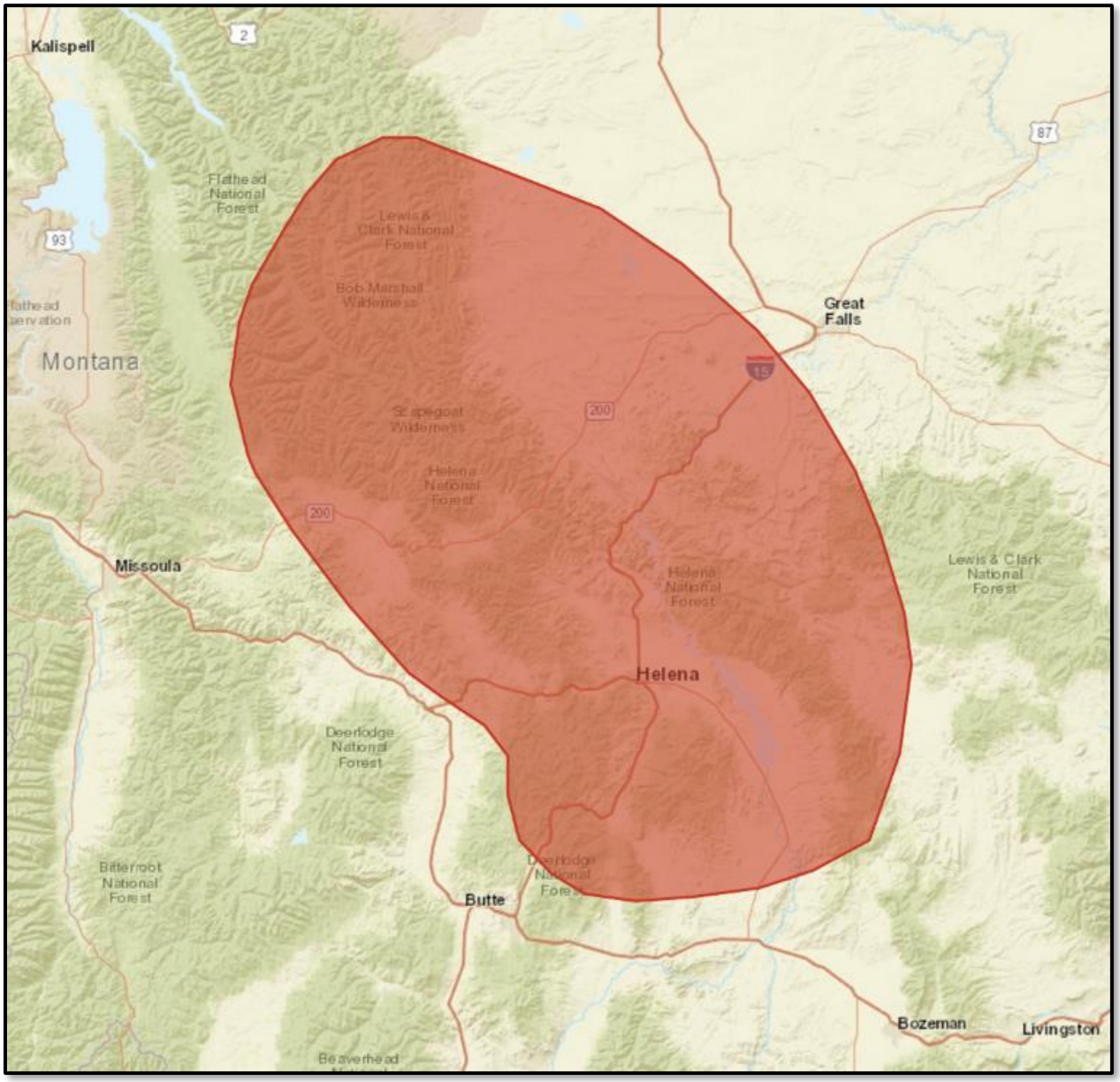
Note: People that identify as being Hispanic are also listed in one of the race categories below.

Table J – Primary Service Area Population by Race and Median Age 2015
(Source – U.S. Census Bureau and ESRI)

Race	Total Population	Median Age	% of Population	% of MT Population
White	62,175	42.6	92.8%	88.3%
Black	578	27.6	0.9%	0.7%
American Indian	1,421	32.5	2.1%	6.5%
Asian	504	37.6	0.8%	0.8%
Pacific Islander	66	32.8	0.1%	0.1%
Other	396	27.5	0.6%	0.8%
Multiple	1,851	21.3	2.8%	2.9%

2015 Primary Service Area Total Population: 66,991 Residents

Map B – Secondary Service Area Map:



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

Table K – 2015 Secondary Service Area Age Distribution
(ESRI estimates)

Ages	Population	% of Total	Nat. Population	Difference
-5	4,967	5.5%	6.3%	-0.8%
5-17	14,240	15.9%	16.6%	-0.7%
18-24	7,406	8.3%	10.1%	-1.8%
25-44	19,588	21.8%	26.1%	-4.3%
45-54	12,730	14.2%	13.4%	+0.8%
55-64	15,006	16.7%	12.8%	+3.9%
65-74	9,859	11.0%	8.6%	+2.4%
75+	5,860	6.5%	6.2%	+0.3%

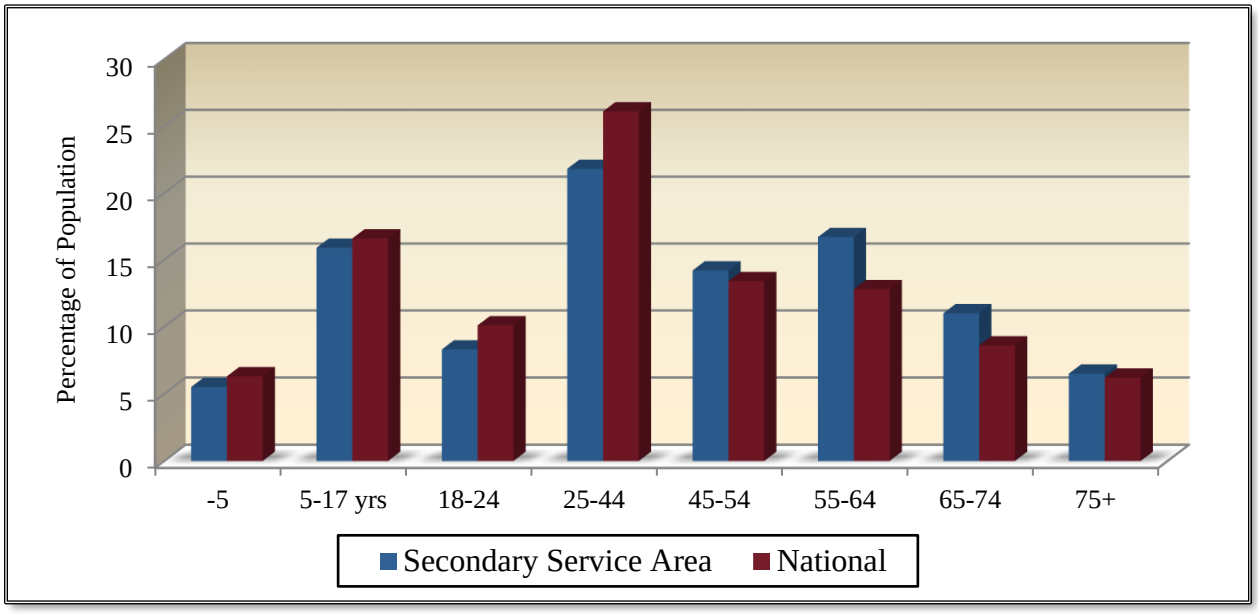
Population: 2015 census estimates in the different age groups in the Secondary Service Area.

% of Total: Percentage of the Secondary Service Area/population in the age group.

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

Difference: Percentage difference between the Secondary Service Area population and the national population.

Chart H – 2015 Secondary Service Area Age Group Distribution



The demographic makeup of the Secondary Service Area, when compared to the characteristics of the national population, indicates that there are some differences with an equal or larger population in the 45-54, 55-64, 65-74 and 75+ age groups and a smaller population in the -5, 5-17, 18-24 and 25-44 age groups. The largest positive variance is in the 55-64 age group with +3.9%, while the greatest negative variance is in the 25-44 age group with -4.3%.

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

Table L – 2015 Secondary Service Area Population Estimates
(U.S. Census Information and ESRI)

Ages	2010 Census	2015 Projection	2020 Projection	Percent Change	Percent Change Nat'l
-5	5,108	4,967	5,061	-0.9%	+0.3%
5-17	14,356	14,240	14,568	+1.5%	-0.7%
18-24	6,780	7,406	7,227	+6.6%	+1.7%
25-44	19,428	19,588	20,662	+6.4%	+7.1%
45-54	14,150	12,730	11,543	-18.4%	-9.7%
55-64	13,521	15,006	14,801	+9.5%	+17.4%
65-74	7,316	9,859	12,328	+68.5%	+50.1%
75+	5,254	5,860	7,152	+36.1%	+22.0%

Chart I – Secondary Service Area Population Growth

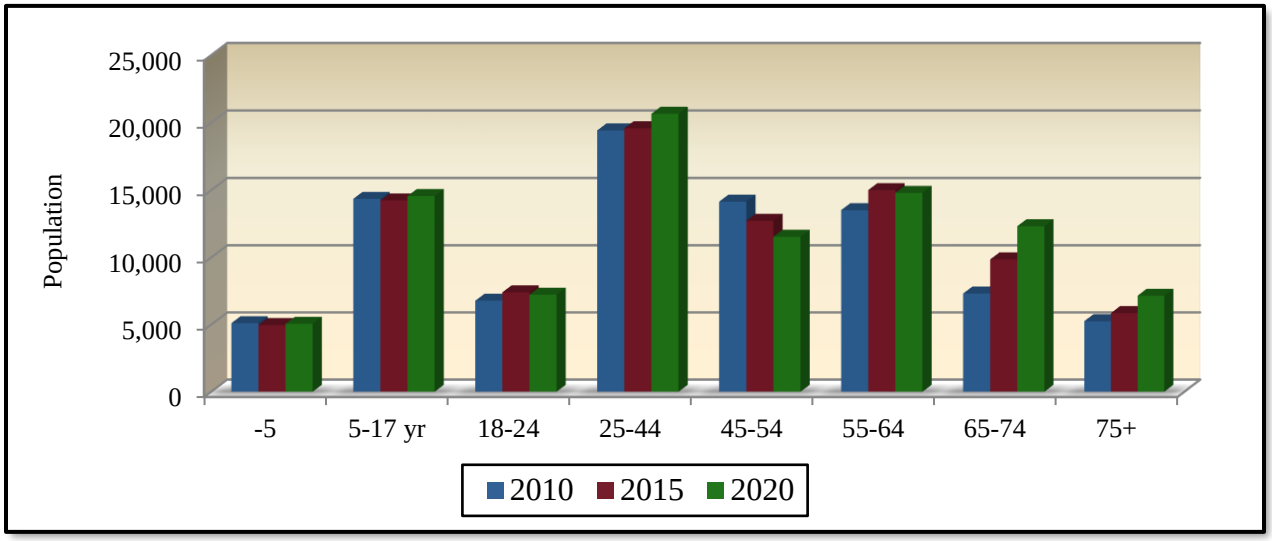


Table L, illustrates the growth or decline in age group numbers from the 2010 census until the year 2020. It is projected that six of eight age groups will experience an increase, with -5 and 45-54 experiencing a decrease. It must be remembered that the population of the United States as a whole is aging and it is not unusual to find negative growth numbers in the younger age groups and significant net gains in the 45 plus age groupings in communities which are relatively stable in their population numbers.

Ethnicity and Race: Below is listed the distribution of the population by ethnicity and race for the Secondary Service Area for 2015 population projections. Those numbers were developed from 2010 Census Data.

Table M – Secondary Service Area Ethnic Population and Median Age 2015
(Source – U.S. Census Bureau and ESRI)

Ethnicity	Total Population	Median Age	% of Population	% of MT Population
Hispanic	2,570	23.1	2.9%	3.6%

Note: People that identify as being Hispanic are also listed in one of the race categories below.

Table N – Secondary Service Area Population by Race and Median Age 2015
(Source – U.S. Census Bureau and ESRI)

Race	Total Population	Median Age	% of Population	% of MT Population
White	83,692	44.7	93.3%	88.3%
Black	639	27.8	0.7%	0.7%
American Indian	1,783	35.3	2.0%	6.5%
Asian	578	37.6	0.6%	0.8%
Pacific Islander	84	31.9	0.1%	0.1%
Other	508	27.8	0.6%	0.8%
Multiple	2,372	22.5	2.6%	2.9%

2015 Secondary Service Area Total Population: 89,656 Residents

Tapestry Segmentation

Tapestry segmentation represents the 4th generation of market segmentation systems that began 30 years ago. The 65-segment Tapestry Segmentation system classifies U.S. neighborhoods based on their socioeconomic and demographic compositions. While the demographic landscape of the U.S. has changed significantly since the 2000 Census, the tapestry segmentation has remained stable as neighborhoods have evolved.

The value of including this information for the Service Areas is that it allows the organization to understand better the consumers/constituents in their service areas and supply them with the right products and services.

The Tapestry segmentation system classifies U.S. neighborhoods into 65 individual market segments. More than 60 attributes including; income, employment, home value, housing types, education, household composition, age and other key determinates of consumer behavior are used to identify neighborhoods.

The following pages and tables outline the top 5 tapestry segments in each of the service areas and provides a brief description of each. This information combined with the key indicators and demographic analysis of each service area help further describe the markets that the Primary Service Area looks to serve with programs, services, and special events.

For comparison purposes, the following are the top 10 Tapestry segments, along with percentage in the United States. The Primary and Secondary Services may or may not reflect these segments:

1. Green Acres (6A)	3.2%
2. Southern Satellites (10A)	3.2%
3. Savvy Suburbanites (1D)	3.0%
4. Salt of the Earth (6B)	2.9%
5. Soccer Moms (4A)	2.8%
	15.1%
6. Middleburg (4C)	2.8%
7. Midlife Constants (5E)	2.5%
8. Comfortable Empty Nesters (5A)	2.5%
9. Heartland Communities (6F)	2.4%
10. Old and Newcomers (8F)	2.3%
	12.5%

Table O – Primary Service Area Tapestry Segment Comparison
(ESRI estimates)

	Primary Service Area		*Demographics*	
	Percent	Cumulative Percent	Median Age	Median HH Income
Middleburg (4C)	18.8%	18.8%	35.3	$55,000
Old & Newcomers (8F)	14.7%	33.5%	38.5	$39,000
Green Acres (6A)	11.5%	45.0%	43.0	$72,000
In Style (5B)	11.4%	56.4%	41.1	$66,000
The Great Outdoors (6C)	6.9%	63.3%	46.3	$53,000

Middleburg (4C) – These neighborhoods transformed from the easy pace of country living to semirural subdivisions in the last decade. Residents are conservative, family-oriented consumers. The market is younger but growing in size and assets, young couples with children. This segment has a significant Hispanic (10.5%) population. Sports include hunting, target shooting, bow hunting and baseball.

Old & Newcomers (8F) – This market features singles' lifestyles, on a budget. The focus is more on convenience than consumerism, economy over acquisition. These are neighborhoods in transition, populated by renters who are just beginning their careers or retiring. Some are still in college; some are taking adult education classes. Age is not always obvious from their choices. There is a significant Hispanic (11.1%) and Black (10.5%) population.

Green Acres (6A) – These resident's lifestyle features country living and self-reliance. They are avid do-it-yourselfers along with gardeners. Outdoor living also features a variety of sports: hunting and fishing, motorcycling, hiking and camping, and even golf. An older market, primarily married couples, most with no children.

In Style (5B) – These residents embrace an urbane lifestyle and that includes support of the arts, travel and extensive reading. They are connected and make full use of the advantages of mobile devices. Professional couples or single households without children, they have the time to focus on their homes and their interests. The population is slightly older and already planning for retirement.

The Great Outdoors (6C) – These neighborhoods are found in pastoral settings throughout the U.S. Consumers are educated empty nesters living an active but modest lifestyle. Their focus is land. They are more likely to invest in real estate or a vacation home than stocks. Although retirement beckons, most of these residents still work, with incomes slightly above the U.S. level. Over 55% of households are married-couple families; 36% are couples with no children living at home.

Table P – Secondary Service Area Tapestry Segment Comparison
(ESRI estimates)

	Secondary Service Area		*Demographics*	
	Percent	**Cumulative Percent**	**Median Age**	**Median HH Income**
Middleburg (4C)	13.9%	13.9%	35.3	$55,000
Old & Newcomers (8F)	10.9%	24.8%		
The Great Outdoors (6C)	10.8%	35.6%	46.3	$53,000
Green Acres (6A)	9.9%	45.5%	43.0	$72,000
In Style (5B)	8.5%	54.0%	41.1	$66,000

Middleburg (4C) – These neighborhoods transformed from the easy pace of country living to semirural subdivisions in the last decade. Residents are conservative, family-oriented consumers. The market is younger but growing in size and assets, young couples with children. This segment has a significant Hispanic (10.5%) population. Sports include hunting, target shooting, bow hunting and baseball.

Old & Newcomers (8F) – This market features singles' lifestyles, on a budget. The focus is more on convenience than consumerism, economy over acquisition. These are neighborhoods in transition, populated by renters who are just beginning their careers or retiring. Some are still in college; some are taking adult education classes. Age is not always obvious from their choices. There is a significant Hispanic (11.1%) and Black (10.5%) population.

The Great Outdoors (6C) – These neighborhoods are found in pastoral settings throughout the U.S. Consumers are educated empty nesters living an active but modest lifestyle. Their focus is land. They are more likely to invest in real estate or a vacation home than stocks. Although retirement beckons, most of these residents still work, with incomes slightly above the U.S. level. Over 55% of households are married-couple families; 36^ are couples with no children living at home.

Green Acres (6A) – These resident's lifestyle features country living and self-reliance. They are avid do-it-yourselfers along with gardeners. Outdoor living also features a variety of sports: hunting and fishing, motorcycling, hiking and camping, and even golf. An older market, primarily married couples, most with no children.

In Style (5B) – These residents embrace an urbane lifestyle and that includes support of the arts, travel and extensive reading. They are connected and make full use of the advantages of mobile devices. Professional couples or single households without children, they have the time to focus on their homes and their interests. The population is slightly older and already planning for retirement.

Demographic Summary

The following summarizes the demographic characteristics of the service areas.

- The Primary Service Area has a reasonable population base (not a low population below 35,000 or a high population of over 100,000) at nearly 67,000. The population base will impact the number of people that will use the center as well as the revenue potential for the facility.

- The Primary Service Area is older with a limited number of children. However, there is expected to be strong growth in the 5-17 age category in the future.

- The Primary Service Area has a higher median household income level than the national and state numbers and the cost of living is relatively low. This indicates the possibility of a higher level of disposable income.

- The spending potential index for recreation is lower for the Primary Service Area than the national numbers but is higher than the state and Secondary Service Area. This statistic indicates a potential willingness to spend more income for recreation purposes.

- The population in the Primary Service Area has very little diversity. This will have very little impact on the potential use of a recreation facility.

- The Secondary Service Area has a large population base (close to the 100,000 threshold of a high population base) at nearly 90,000. This will add another 23,000 potential users for the center. The rest of the demographic characteristics are similar to the Primary Service Area.

Sports Participation Numbers

In addition to analyzing the demographic realities of the service areas, it is possible to project possible participation in recreation and sport activities.

Participation Numbers: On an annual basis the National Sporting Goods Association (NSGA) conducts an in-depth study and survey of how Americans spend their leisure time. This information provides the data necessary to overlay rate of participation onto the Primary Service Area to determine market potential. The information contained in this section of the report, utilizes the NSGA's most recent survey. For that data was collected in 2015 and the report was issued in May of 2016.

B*K takes the national average and combines that with participation percentages of the Primary Service Area based upon age distribution, median income, region and National number. Those four percentages are then averaged together to create a unique participation percentage for the service area. This participation percentage when applied to the population of the Primary Service Area then provides an idea of the market potential for various activities.

Community Recreation Related Activities Participation: These activities are typical components of an active recreation center.

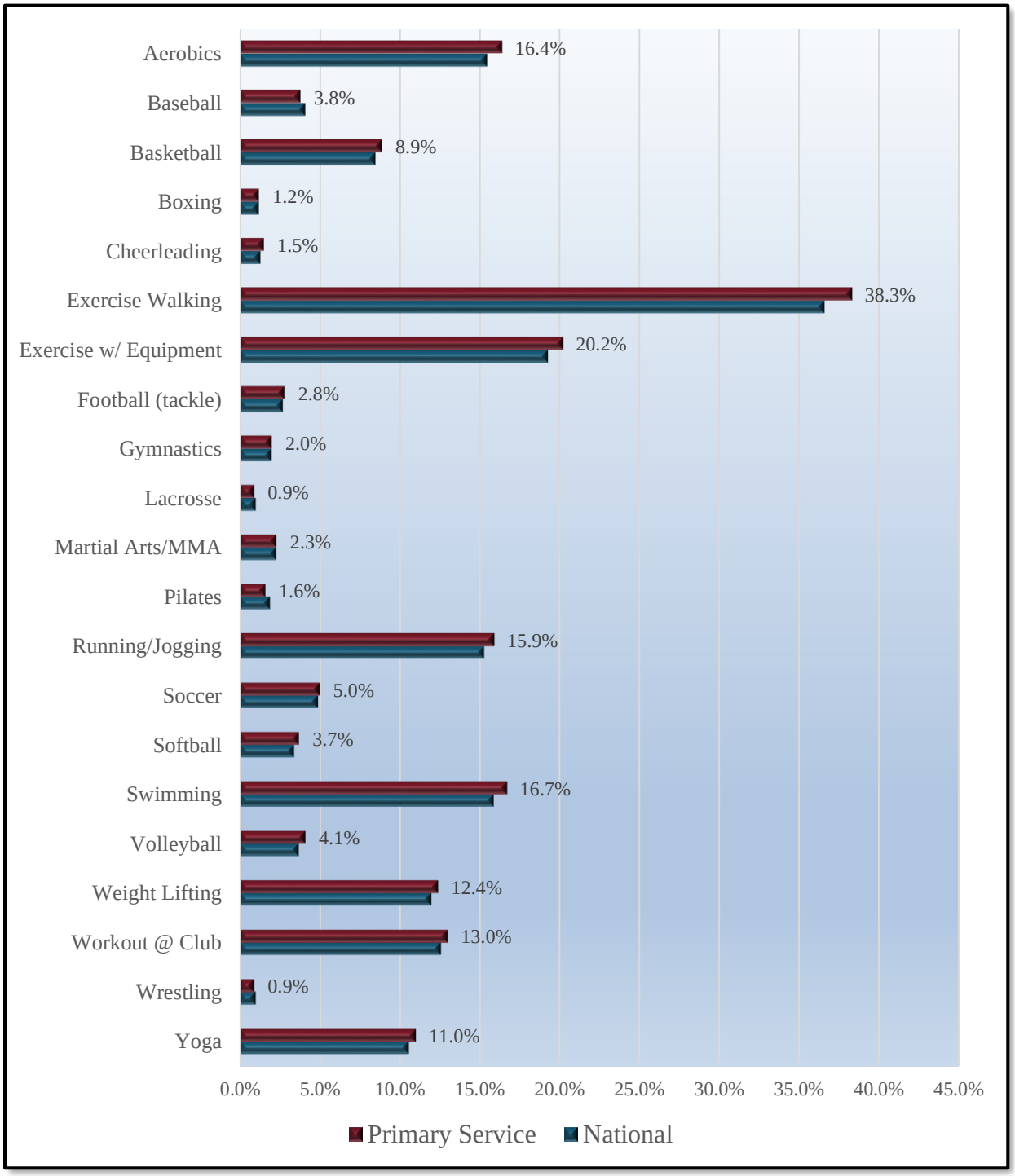
Table Q – Recreation Activity Participation Rates for the Primary Service Area

Indoor Activities	Age	Income	Region	Nation	Average
Aerobics	15.1%	16.6%	18.4%	15.5%	16.4%
Baseball	3.8%	4.5%	2.8%	4.1%	3.8%
Basketball	8.0%	10.1%	8.9%	8.5%	8.9%
Boxing	1.1%	1.3%	1.3%	1.2%	1.2%
Cheerleading	1.2%	1.8%	1.8%	1.3%	1.5%
Exercise Walking	37.1%	38.8%	40.9%	36.6%	38.3%
Exercise w/ Equipment	19.0%	21.5%	21.0%	19.3%	20.2%
Football (tackle)	2.5%	3.3%	2.6%	2.7%	2.8%
Gymnastics	1.9%	2.4%	1.7%	2.0%	2.0%
Lacrosse	0.9%	0.7%	0.8%	1.0%	0.9%
Martial Arts / MMA	2.1%	2.8%	2.0%	2.3%	2.3%
Pilates	0.3%	1.9%	2.3%	1.9%	1.6%
Running/Jogging	14.4%	16.7%	17.1%	15.3%	15.9%
Soccer	4.4%	5.5%	5.1%	4.9%	5.0%
Softball	3.2%	4.7%	3.7%	3.4%	3.7%
Swimming	15.6%	17.6%	17.8%	15.9%	16.7%
Volleyball	3.5%	4.7%	4.4%	3.7%	4.1%
Weight Lifting	10.1%	12.8%	14.8%	12.0%	12.4%
Workout @ Clubs	12.2%	13.0%	14.3%	12.6%	13.0%
Wrestling	1.0%	1.1%	0.7%	1.0%	0.9%
Yoga	10.0%	10.9%	12.5%	10.6%	11.0%

	Age	Income	Region	Nation	Average
Did Not Participate	22.7%	21.6%	20.7%	22.1%	21.8%

Age: Participation based on individuals ages 7 & Up of the Primary Service Area.
Income: Participation based on the 2013 estimated median household income in the Primary Service Area.
Region: Participation based on regional statistics (Mountain).
National: Participation based on national statistics.
Average: Average of the four columns.

Chart J – Comparison of National & Primary Service Area Participation Percentage:



Anticipated Participation Numbers by Activity: Utilizing the average percentage from Table-Q above plus the 2010 census information and census estimates for 2015 and 2020 (over age 7) the following comparisons are available.

Table R – Participation Rates Primary Service Area

Indoor Activity	Average	2010 Part.	2015 Part.	2020 Part.	Difference
Aerobics	16.4%	9,580	10,073	10,527	+946
Baseball	3.8%	2,224	2,338	2,443	+220
Basketball	8.9%	5,186	5,453	5,698	+512
Boxing	1.2%	720	757	791	+71
Cheerleading	1.5%	894	940	982	+88
Exercise Walking	38.3%	22,413	23,566	24,627	+2,214
Exercise w/ Equipment	20.2%	11,809	12,417	12,976	+1,167
Football (tackle)	2.8%	1,621	1,704	1,781	+160
Gymnastics	2.0%	1,163	1,223	1,278	+115
Lacrosse	0.9%	504	530	554	+50
Martial Arts / MMA	2.3%	1,349	1,418	1,482	+133
Pilates	1.6%	937	985	1,029	+93
Running/Jogging	15.9%	9,279	9,757	10,196	+917
Soccer	5.0%	2,909	3,059	3,196	+287
Softball	3.7%	2,192	2,305	2,408	+217
Swimming	16.7%	9,778	10,282	10,744	+966
Volleyball	4.1%	2,375	2,498	2,610	+235
Weight Lifting	12.4%	7,258	7,631	7,975	+717
Workout @ Clubs	13.0%	7,620	8,013	8,373	+753
Wrestling	0.9%	554	582	609	+55
Yoga	11.0%	6,433	6,764	7,068	+635

	Average	2010 Part.	2015 Part.	2020 Part.	Difference
Did Not Participate	21.8%	12,722	13,377	13,979	+1,257

Note: The estimated participation numbers indicated above are for activities that could take place in and around an active aquatic/recreation center. These figures do not necessarily translate into attendance figures for various activities or programs. The "Did Not Participate" statistics refers to all 55 activities outlined in the NSGA 2015 Survey Instrument.

Participation by Ethnicity and Race: The table below compares the overall rate of participation nationally with the rate for Hispanics and African Americans. Utilizing information provided by the National Sporting Goods Association's 2015 survey, the following comparisons are possible.

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

Indoor Activity	Primary Service Area	National Participation	African American Participation	Hispanic Participation
Aerobics	16.4%	15.5%	14.5%	14.1%
Baseball	3.8%	4.1%	2.3%	4.8%
Basketball	8.9%	8.5%	12.4%	9.6%
Boxing	1.2%	1.2%	2.0%	2.5%
Cheerleading	1.5%	1.3%	2.0%	1.0%
Exercise Walking	38.3%	36.6%	31.2%	28.1%
Exercise w/ Equipment	20.2%	19.3%	17.6%	16.2%
Football (tackle)	2.8%	2.7%	4.0%	3.5%
Gymnastics	2.0%	2.0%	2.2%	2.1%
Lacrosse	0.9%	1.0%	1.1%	1.1%
Martial Arts / MMA	2.3%	2.3%	2.3%	2.9%
Pilates	1.6%	1.9%	2.0%	2.5%
Running/Jogging	15.9%	15.3%	14.3%	18.9%
Soccer	5.0%	4.9%	2.4%	6.3%
Softball	3.7%	3.4%	2.8%	3.4%
Swimming	16.7%	15.9%	8.3%	13.7%
Volleyball	4.1%	3.7%	3.0%	4.4%
Weight Lifting	12.4%	12.0%	11.7%	11.8%
Workout @ Clubs	13.0%	12.6%	11.3%	13.1%
Wrestling	0.9%	1.0%	1.1%	1.4%
Yoga	11.0%	10.6%	8.4%	11.9%

Primary Service Part: The unique participation percentage developed for the Primary Service Area.

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

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

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

There is not a significant Black or Hispanic population in the Primary Service Area. As such these numbers play less of a factor with regards to overall participation.

Summary of Sports Participation: The following chart summarizes participation in both indoor and outdoor activities utilizing information from the 2015 National Sporting Goods Association survey.

Table T – Sports Participation Summary

Sport	Nat'l Rank[5]	Nat'l Participation (in millions)	Primary Service	Primary Service Area Percentage
Exercise Walking	1	106.3	1	38.3%
Exercising w/ Equipment	2	56.3	2	20.2%
Swimming	3	46.3	3	16.7%
Aerobic Exercising	4	45.1	4	16.4%
Running/Jogging	5	44.5	5	15.9%
Workout @ Club	8	36.6	6	13.0%
Weight Lifting	11	34.8	7	12.4%
Yoga	13	30.7	8	11.0%
Basketball	14	24.8	9	8.9%
Soccer	20	14.1	10	5.0%
Baseball	23	11.8	12	3.8%
Volleyball	24	10.7	11	4.1%
Softball	27	9.8	13	3.7%
Football (tackle)	32	7.8	14	2.8%
Martial Arts / MMA	36	6.6	15	2.3%
Gymnastics	39	5.8	16	2.0%
Pilates	42	5.6	17	1.6%
Cheerleading	46	3.7	18	1.5%
Boxing	47	3.6	19	1.2%
Wrestling	51	3.0	20	0.9%
Lacrosse	52	2.9	20	0.9%

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

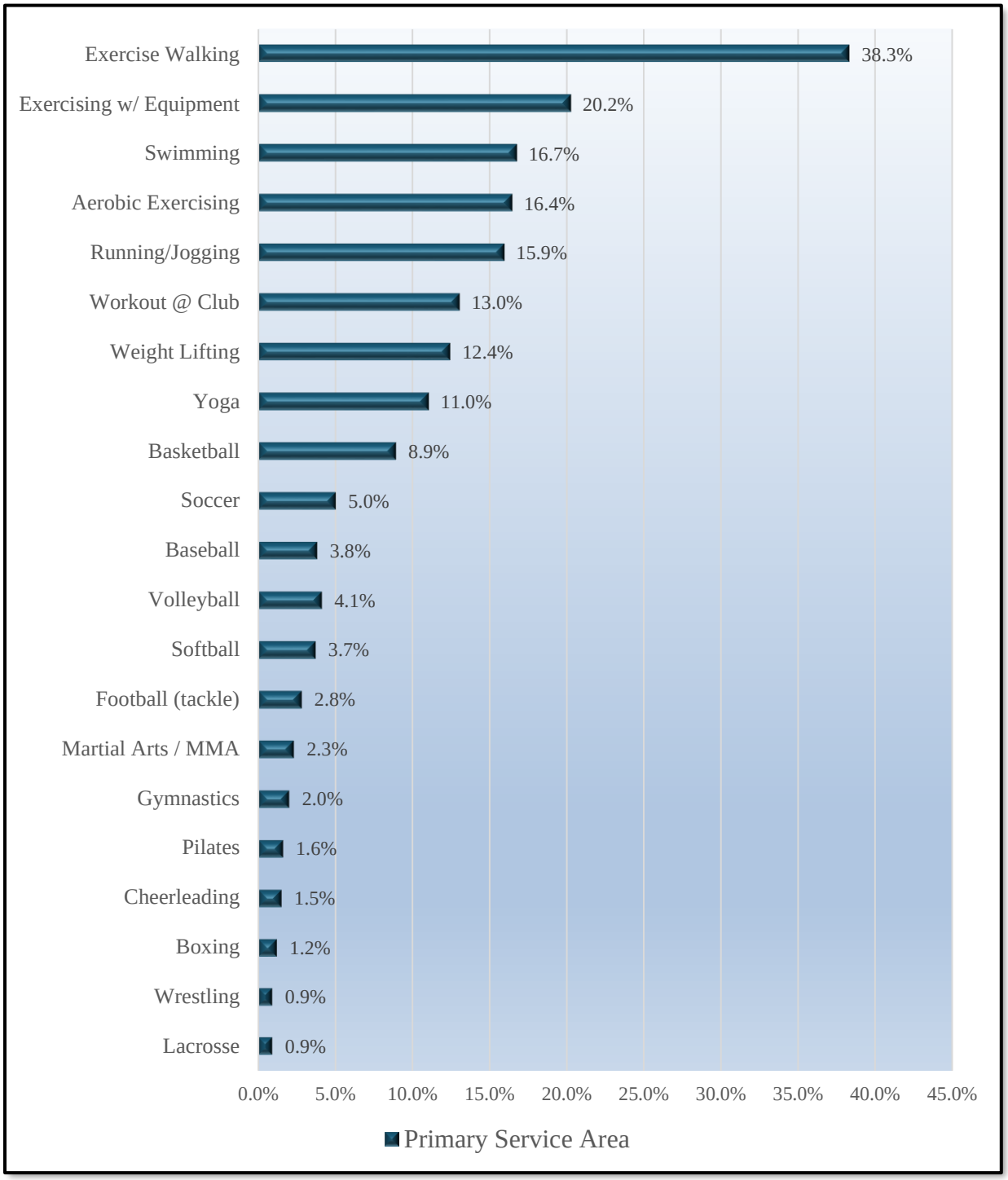
Nat'l Participation: Population that participate in this sport on national survey.

Primary Service Rank: The rank of the activity within the Primary Service Area.

Primary Service %: Percentage of population participating in the activities based upon average from Table-Q.

[5] This rank is based upon the 54 activities reported on by NSGA in their 2014 survey instrument.

Chart K – Sports Participation in Primary Service Area



Participation by Age Group: Within the NSGA survey, participation is broken down by age groups. As such B*K can identify the top 3 age groups participating in the activities reflected in this report.

Table U – Participation by Age Group:

Activity	Largest	Second Largest	Third Largest
Aerobics	25-34	35-44	18-24
Baseball	7-11	12-17	25-34
Basketball	7-11	12-17	18-24
Boxing	25-34	18-24	12-17
Cheerleading	7-11	12-17	18-24
Exercise Walking	55-64	65-74	45-54
Exercise w/ Equipment	18-24	25-34	35-44
Football (tackle)	12-17	7-11	18-24
Gymnastics	7-11	12-17	25-34
Lacrosse	12-17	7-11	18-24
Martial Arts / MMA	7-11	12-17	25-34
Pilates	25-34	35-44	18-24
Running/Jogging	18-24	12-17	25-34
Soccer	7-11	12-17	18-24
Softball	12-17	7-11	35-44
Swimming	7-11	12-18	35-44
Volleyball	12-17	7-11	18-24
Weight Lifting	18-24	25-34	35-44
Workout @ Clubs	18-24	25-34	35-44
Wrestling	12-17	7-11	18-24
Yoga	25-34	18-24	35-44

Largest: Age group with the highest rate of participation.

Second Largest: Age group with the second highest rate of participation.

Third Largest: Age group with the third highest rate of participation.

Market Potential Index for Adult Participation: In addition to examining the participation numbers for various indoor activities through the NSGA 2015 Survey and the Spending Potential Index for Entertainment & Recreation, B*K can access information about Sports & Leisure Market Potential. The following information illustrates participation rates for adults in various activities in the Primary Service Area.

Table V – Market Potential Index for Adult Participation in Activities

Adults participated in:	Expected Number of Adults	Percent of Population	MPI
Aerobics	5,159	9.9%	111
Baseball	2,325	4.5%	99
Basketball	4,085	7.8%	94
Football	2,591	5.0%	99
Jogging/Running	7,028	13.5%	106
Pilates	1,439	2.8%	99
Soccer	1,795	3.4%	91
Softball	1,894	3.6%	106
Swimming	9,130	17.5%	111
Volleyball	1,981	3.8%	107
Walking for Exercise	15,759	30.2%	108
Weight Lifting	6,044	11.6%	109
Yoga	3,840	7.4%	103

Expected # of Adults: Number of adults, 18 years of age and older, participating in the activity in the Primary Service Area.

Percent of Population: Percent of the service area that participates in the activity.

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

This table indicates that the overall propensity for adults to participate in the various activities listed is greater than the national number of 100 in 8 of 13 instances. In many cases when a participation number is lower than the national number, primary factors include a lack of facilities or an inability to pay for services and programs.

Sports Participation Trends: Below are listed a number of sports activities and the percentage of growth or decline that each has experienced nationally over the last ten years (2006-2015).

Table W – National Activity Trend (in millions)

Increasing in Popularity

	2006 Participation	2015 Participation	Percent Change
Yoga[6]	10.7	30.7	186.9%
Lacrosse[7]	1.2	2.9	141.7%
Running/Jogging	28.8	44.5	54.5%
Gymnastics[8]	3.9	5.8	48.7%
Aerobic Exercising	33.7	45.1	33.8%
Exercise Walking	87.5	106.3	21.5%
Exercising w/ Equipment	52.4	56.3	7.4%
Weight Lifting	32.9	34.8	5.8%
Martial Arts/MMA[9]	6.4	6.6	3.1%
Pilates[10]	5.5	5.6	1.8%
Soccer	12.8	14.1	0.7%

2015 Participation: The number of participants per year in the activity (in millions) in the United States.

2006 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 2006 to 2015.

[6] Growth Since 2007.
[7] Growth Since 2007.
[8] Growth Since 2009.
[9] Growth Since 2013.
[10] Growth Since 2014.

Decreasing in Popularity

	2006 Participation	2015 Participation	Percent Change
Workout @ Club	37.0	36.6	-1.1%
Cheerleading	3.8	3.7	-2.6%
Volleyball	11.1	10.7	-3.6%
Boxing[11]	3.8	3.6	-5.3%
Basketball	26.7	24.8	-7.1%
Swimming	56.5	46.3	-18.1%
Baseball	14.6	11.8	-19.2%
Softball	12.4	9.8	-21.0%
Wrestling	3.8	3.0	-21.1%
Football (tackle)	10.1	7.8	-22.8%

2015 Participation: The number of participants per year in the activity (in millions) in the United States.

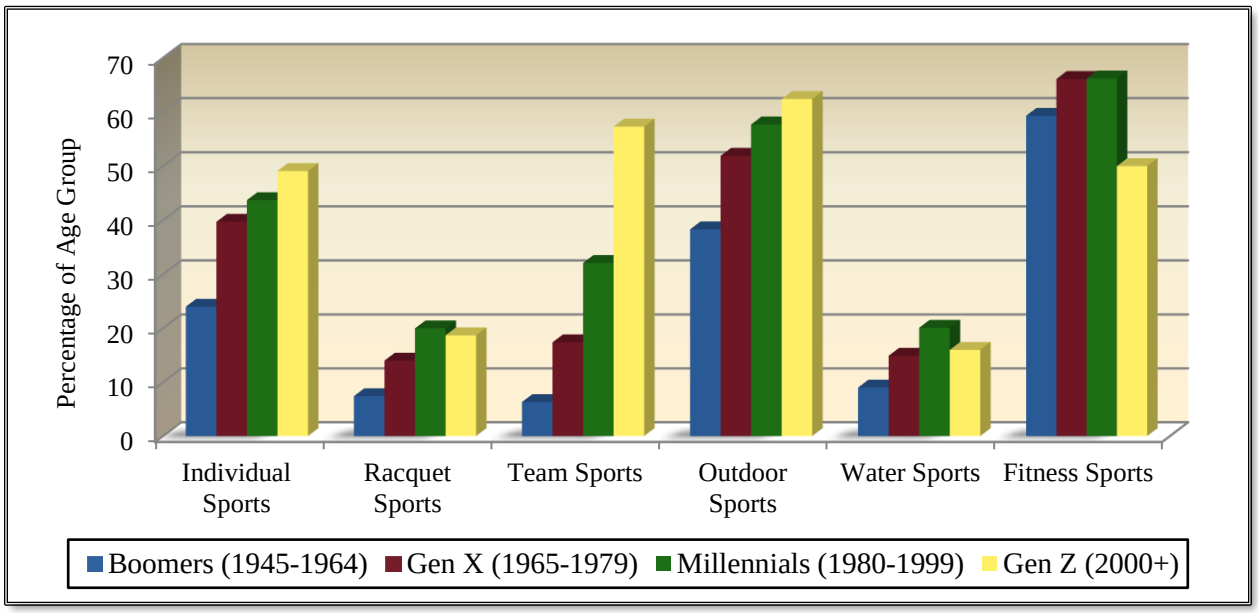
2006 Participation: The number of participants per year in the activity (in millions) in the United States.

Percent Change: The percent change in the level of participation from 2006 to 2015.

[11] Decrease since 2013.

Sports & Fitness Industry Association: Another source of sports participation statistics is through the SFIA. The following table indicates the rate of participation in different sports activities by age generation.

Chart L – SFIA Sports Activity Participation by Generation



Aquatic Activity Trends: The following table looks at the participation trends in these specific aquatic activities over the last 5 years

Table X – SFIA Aquatic Activity Trends (in millions)

	2009 Participation	2014 Participation	Percent Change
Triathlon	1.1	2.2	+91.9%
Swim for Fitness	21.5	25.3	+17.6%
Swimming on a Team	2.4	2.7	+14.7%
Aquatic Exercise	9.0	9.1	+1.8%

Note: Swim for Fitness and Swimming on a Team statistics are from 2011 to 2014.

It is significant that each of the aquatic activities has seen an increase over the last five years.

Recreation Activity and Facility Trends: There continues to be very strong growth in the number of people participating in recreation and leisure activities. The Physical Activity Council in its 2013 study indicated that 33% of Americans (age 6 and older) are active to a healthy level. However, the study also indicated that 28% of Americans were inactive. 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. IHRSA reported that membership in U.S. health clubs increased by 2.2% from 2014 to 2015, and memberships in health clubs reached an all-time high of 55.3 million in 2015. Statistics also indicate that approximately 1 out of 5 people of the U.S. population (or 20%) 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 Center 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 ice hockey 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.

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

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

As a result, many communities have attempted to include these amenities in community recreation facilities. With the growth in youth sports and the high demand for school gyms, most

communities are experiencing an acute lack of gymnasium space. Weight/cardiovascular space is also in high demand and provides a facility with the potential to generate significant revenues.

The success of most indoor recreation facilities is dependent on meeting the recreational needs of a variety of individuals. The fastest growing segment of society is the senior population and meeting the needs of this group is especially important now and will only grow more so in the coming years. Indoor walking tracks, exercise areas, pools and classroom spaces are important to this age group. Marketing to the younger more active senior (usually age 55-70) 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.

As more and more communities attempt to develop community recreation facilities the issues of competition with other providers in the market area have inevitably been raised. The loudest objections have come from the private health club market and their industry voice IHRSA. The private sector has vigorously contended that public facilities unfairly compete with them in the market and have spent considerable resources attempting to derail public projects. However, the reality is that in most markets where public community recreation centers have been built, the private sector has not been adversely affected and in fact in many cases has continued to grow. This is due in large part to the fact that public and private providers serve markedly different markets. 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. 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 an annual pass and also a number of community functions and activities where no fee may be collected at all. Most community wellness/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. 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 & Associates at community recreation centers across the United States, the following represents the basic benchmarks.

- The majority of community centers that are being built today are between 65,000 and 75,000 square feet. Most centers include three primary components A) A pool area usually with competitive and leisure amenities, B) Multipurpose gymnasium space, and C) Weight/cardiovascular equipment area. In addition, most centers also have group exercise rooms, drop-in childcare, and classroom and/or community spaces.

- For most centers to have an opportunity to cover all of their operating expenses with revenues, they must have a service population of at least 50,000 and an aggressive fee structure.

- Most centers that are between 65,000 and 75,000 square feet have an operating budget of between $1,500,000 and $2,000,000 annually. Nearly 65% of the operating costs are from personnel services, followed by approximately 25% for contractual services, 8% for commodities, and 2% for capital replacement.

- For centers that serve a more urban population and have a market driven fee structure, they should be able to recover 70% to 100% of operating expenses. For centers in more rural areas the recovery rate is generally 50% to 75%. Facilities that can consistently cover all of their operating expenses with revenues are rare. The first true benchmark year of operation does not occur until the third full year of operation.

- The majority of centers of the size noted (and in an urban environment) above average daily paid attendance of 800 to as much as 1,000 per day. These centers will also typically sell between 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 cost 25% to 50% higher than the resident rate and are usually a topic of discussion amongst elected officials. Daily rates for residents average between $5.00 and $8.00 for adults, $4.00 and $6.00 for youth and the same for seniors. Annual rates for residents average between $300 and $500 for adults, and $150 and $250 for youth and seniors. Family annual passes tend to be heavily discounted and run between $500 and $1,000.

- Most centers are open an average of 105 hours a week, with weekday hours being 5:00 am to 10:00 pm, Saturdays 8:00 am to 8:00 pm and Sundays from noon to 8:00 pm. There is now a trend to open earlier on Sundays as well. Often hours are shorter during the summer months.

Note: These statistics vary by regions of the country.

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

General:

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

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

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

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

5. Social welfare programs – An emerging area for many centers is the use of space for social service activities and programs. Special population activities, teen and senior 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, during the summer, or during weekend hours. Instructional programs and competitive sports programs are especially popular, as well as drop-in use of the facility.

4. Teens - A major focus of many community 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 service areas continue to age, continuing to meet the needs of an older senior population will be essential. As has been noted, a more active and physically oriented senior is now demanding services to ensure their continued health. Social programs as well as 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.

Aquatic Participation Trends: Swimming is one of the most popular sports and leisure activities, meaning that there is a significant market for aquatic pursuits. Approximately 17.8% of the population in the Mountain region of the country participates in aquatic activities. This is a significant segment of the population.

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

A competitive pool allows for a variety of aquatic activities to take place simultaneously and can handle aqua exercise classes, learn to swim programs as well competitive swim training and meets (short course and possibly long course). In communities where there are a number of competitive swim programs, utilizing a pool with 8 lanes or more is usually important. A competitive pool that is designed for hosting meets will allow a community to build a more regional or even national identity as a site for competitive swimming. However, it should be realized that regional and national swim meets are difficult to obtain on a regular basis, take a considerable amount of time, effort and money to run; can be disruptive to the regular user groups and can be financial losers for the facility itself. On the other side such events can provide a strong economic stimulus to the overall community.

Competitive diving is an activity that is often found in connection with competitive swimming. Most high school and regional diving competition centers on the 1-meter board with some 3 meter events (non-high school). The competitive diving market, unlike swimming, is usually very small (usually 10% to 20% the size of the competitive swim market) and has been decreasing steadily over the last ten years or more. As a result, many states have or are considering the elimination of diving as a part of high school swimming. Diving programs have been more viable in markets with larger populations and where there are coaches with strong diving reputations. Moving from springboard diving to platform (5 meter and 10 meter, and sometimes 3 and 7.5 meters), the market for divers drops even more while the cost of construction with deeper pool depths and higher dive towers becomes significantly larger. Platform diving is usually only a competitive event in regional and national diving competitions. As a result, the need for inclusion of diving platforms

in a competitive aquatic facility needs to be carefully studied to determine the true economic feasibility of such an amenity.

There are a couple of other aquatic sports that are often competing for pool time at competitive aquatic centers. However, their competition base and number of participants is relatively small. Water polo is a sport that continues to be reasonably popular on the west coast but is not nearly as strong in Montana and uses a space of 25 yards or meters by 45-66 feet wide (the basic size of an 8 lane, 25-yard pool). However, a minimum depth of 6 foot 6 inches is required which is often difficult to find in more community based facilities. Synchronized swimming also utilizes aquatic facilities for their sport and they also require deeper water of 7-8 feet. This also makes the use of some community pools difficult.

Without doubt the hottest trend in aquatics is the leisure pool concept. This idea of incorporating slides, lazy rivers (or current channels), fountains, zero depth entry and other water features into a pool's design has proved to be extremely popular for the recreational user. The age of the conventional pool in most recreational settings has greatly diminished. 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 that is in a park like setting than a conventional aquatics facility.

Another trend that is growing more popular in the aquatic's field is the development of a raised temperature therapy pool for relaxation, socialization, and rehabilitation. 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 has enhanced this type of amenity and created a pleasant atmosphere for adult socialization.

The multi-function indoor aquatic center concept of delivering aquatics services continues to grow in acceptance with the idea of providing for a variety of aquatics activities and programs 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 and therapy water, in the same facility has been well received in the market. This idea has proven to be financially successful by centralizing pool operations for recreation service providers and through increased generation of revenues from patrons willing to pay for an aquatics experience that is new and exciting. Indoor aquatic centers have been instrumental in developing a true family appeal for community-based facilities. The keys to

success for this type of center revolve around the concept of intergenerational use in a quality facility that has an exciting and vibrant feel in an outdoor like atmosphere.

Also changing is the orientation of aquatic centers from stand-alone facilities that only have aquatic features to more of a full-service recreation center that has fitness, sports and community based amenities. This change has allowed for a better rate of cost recovery and stronger rates of use of the aquatic portion of the facility as well as the other "dry side" amenities.

Aquatic Facilities Market Orientation: Based on the market information, the existing pools, and typical aquatic needs within a community, there are specific market areas that need to be addressed with any aquatic facility. These include:

1. **Leisure/recreation aquatic activities -** This includes a variety of activities found at leisure pools with zero depth entry, warm water, play apparatus, slides, seating areas and deck space. These are often combined with other non-aquatic areas such as concessions and birthday party or other group event areas.

2. **Instructional programming -** The primary emphasis is on teaching swimming and lifesaving skills to many different age groups. These activities have traditionally taken place in more conventional pool configurations but should not be confined to just these spaces. Reasonably warm water, shallow depth with deeper water (4 ft. or more), and open expanses of water are necessary for instructional activities. Easy pool access, a viewing area for parents, and deck space for instructors is also crucial.

3. **Fitness programming -** These types of activities continue to grow in popularity among a large segment of the population. From aqua exercise classes, to lap swimming times, these programs take place in more traditional settings that have lap lanes and large open expanses of water available at a 3 1/2 to 5 ft. depth.

4. **Therapy** – A growing market segment for many aquatic centers is the use of warm, shallow water for therapy and rehabilitation purposes. Many of these services are offered by medically based organizations that partner with the center for this purpose.

5. **Competitive swimming/diving -** Swim team competition and training for youth, adults and seniors requires a traditional 6 to 10 lane pool with a 1 and/or 3 meter diving boards at a length of 25 yards or 50 meters. Ideally, the pool depth should be no less than 4 ft. deep at the turn end and 6 feet for starts (7 is preferred). Spectator seating and deck space for staging meets is necessary. This market usually has strong demands for competitive pool space and time during prime times of center use.

6. **Specialized uses** – Activities such as water polo and synchronized swimming can also take place in competitive pool areas as long as the pool is deep enough (7 ft. minimum) and the pool area is large enough. However, these are activities that have small participant numbers and require relatively large pool areas. As a result, it may be difficult to meet the needs of specialized uses on a regular basis.

7. **Social/relaxation** - The appeal of using an aquatics area for relaxation has become a primary focus of many aquatic facilities. This concept has been very effective in drawing non-swimmers to aquatic facilities and expanding the market beyond the traditional swimming boundaries. The use of natural landscapes and creative pool designs that integrate the social elements with swimming activities has been most effective in reaching this market segment.

8. **Special events/rentals** - There is a market for special events including kid's birthday parties, corporate events, community organization functions, and general rentals to outside groups. The development of this market will aid in the generation of additional revenues and these events/rentals can often be planned for after or before regular hours or during slow use times. It is important that special events or rentals not adversely affect daily operations or overall center use.

Specific market segments include:

1. **Families** - Within this market, an orientation towards family activities is essential. The ability to have family members of different ages participate in a fun and vibrant facility is essential.

2. **Pre-school children** - The needs of pre-school age children need to be met with very shallow or zero depth water which is warm and has play apparatus designed for their use. Interactive programming involving parents and toddlers can also be conducted in more traditional aquatic areas as well.

3. **School age youth** - A major focus of most pools is to meet the needs of this age group from recreational swimming to competitive aquatics. The leisure components such as slides, fountains, lazy rivers and zero depth will help to bring these individuals to the pool on a regular basis for drop-in recreational swimming. The lap lanes provide the opportunity and space necessary for instructional programs and aquatic team use.

4. **Teens** - Another aspect of many pools is meeting the needs of the teenage population. Serving the needs of this age group will require leisure pool amenities that will keep their interest (slides) as well as the designation of certain "teen" times of use.

5. **Adults** – This age group has a variety of needs from aquatic exercise classes to lap swimming, triathlon training and competitive swimming through the master's program.

6. **Seniors -** As the population of the United States and the service area continues to age, meeting the needs of an older senior population will be essential. A more active and physically oriented senior is now demanding services to ensure their continued health. Aqua exercise, lap swimming, therapeutic conditioning and even learn to swim classes have proven to be popular with this age group.

7. **Special needs population -** This is a secondary market, but with the A.D.A. requirements and the existence of shallow warm water and other components, the amenities are present to develop programs for this population segment. Association with a hospital and other therapeutic and social service agencies will be necessary to reach this market.

8. **Special interest groups -** These include swim teams (and other aquatic teams), school district teams, day care centers and social service organizations. While the needs of these groups can be great, their demands on an aquatics 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.

With the proper pools and strong utilization of the aquatics area, it is possible to meet most of the varied market orientations as outlined above.

Market Area Facilities Assessment: Within the market area for the proposed Helena Multi-Sport Recreation Complex there are a limited number of indoor aquatic, sports, recreation and fitness facilities to serve the population base.

Public Providers

There are only a few public facilities in the market area. It is significant that the City of Helena does not really have any indoor active recreation space in the community. There is the Helena Civic Center but it supports the arts, meetings and small events.

Last Chance Splash, Waterpark and Pool – Located in Memorial Park, this City of Helena outdoor aquatic center features a 50 meter by 25 yard pool with a diving well, a separate leisure pool with a lazy river, slides and interactive play features.

Lewis & Clark County Fairgrounds – The fairgrounds has a 36,000 square foot Exhibit Hall and Entry Building that hosts a wide variety of events including recreation and sports related activities. This is a significant facility and any new recreation facility will need to consider the impact of this facility.

East Helena City Hall – Since City Hall was part of an old school, there is a small gym in the building that is utilized for recreation purposes.

East Helena Pool – Located at Kennedy Park, this City of East Helena outdoor pool is 5 lane and 25 yards. The local swim team has been investigating the possibility of covering the pool with an inflatable air structure so it can be used year around.

School Gyms – The Helena School District as well as East Helena and Clancy all have schools that can be utilized by the community for recreation purposes. However, with significant school demands, there is limited time available for use.

Lewis & Clark County Fairgrounds

Last Chance Splash, Waterpark and Pool

Non-Profit Providers

There are really only two significant indoor sports, fitness and aquatic non-profit providers in the greater Helena market area.

Helena Family YMCA – Located on the edge of Centennial Park, this two story facility has a 4 lane lap pool, gymnasium, fitness area and drop-in child care space. They are a major provider of childcare and early learning programs in the community. The facility is in need of a significant upgrade and expansion but there is very limited site area to accomplish this due to the restrictions on the old dump site.

The Salvation Army – They have a gymnasium at the Helena Corps Community Center that supports many of their programs and functions.

Helena Family YMCA

Capital City Health Club

Private

The other major provider of sports, fitness and aquatic facilities is the private sector.

Carroll College – The college used to have a 6 lane by 25 yard pool that served as the primary indoor competitive pool in the Helena area. It was closed a little over a year ago due to structural issues. There is currently a physical education building that has a collegiate gym. The college is getting ready to open a new student recreation center that will have fitness and other amenities but there will be little access available for the general public.

Broadwater Hot Springs & Fitness – This private health club features hot springs pools as well as a fitness center and racquetball courts.

Capital City Health Club – This is the premier private health club in Helena and the facility has a large weight cardio area, a 4 lane lap pool, gym and a physical therapy clinic. Two lanes of the pool are utilized by several local swim teams for practice on a limited basis.

Crossroads Sports & Fitness Club – This center has a fitness area as well as a 3 lane lap pool. It also has a small indoor track.

Fuel Fitness – This fitness center is known for its focus on power lifting.

Helena Athletic Club – Despite its name, this club is really a location for tumbling, gymnastics and cheerleading.

Tiny's Gym – This is a small fitness center.

Atlas Fitness – This is a gym that focuses on weight and functional training.

Helena Ice Arena – This single sheet indoor rink supports a Jr.-A hockey team as well as a youth hockey program.

Last Chance Tennis Center - This is a three court indoor tennis center.

There are also a number of specialty yoga and fitness studios located in the greater Helena area as well.

Other Providers Conclusion: After analyzing the existing indoor aquatic, sports, recreation and fitness facilities in the greater Helena market, with no indoor public aquatic facilities available, and no true public recreation center, there is a strong market for an indoor multi-sport complex. The YMCA and the private health clubs are the major providers in the area but if the Multi-Sport Recreation Complex has a different market focus and provides facilities that are lacking in the market (competitive pool, gym space, etc.) the project can be successful.

***Market Opportunities* -** Based on the other aquatic, recreation, sports and fitness facilities located in market area, the following are market opportunities for the proposed Helena Multi-Sport Recreation Complex.

- The Secondary Service Area with just under 90,000 residents is large enough to support a significant indoor recreation facility. The population in both service areas is projected to continue to grow over the next five years.

- The Secondary Service Area has a reasonably high median household income level and there is expected to be growth in the youth age categories in the future. These factors will contribute to higher rates of participation in most recreation activities.

- There are no true public indoor pools in the market area and no indoor pool that is able to support competitive swimming.

- There is not a comprehensive indoor recreation center to serve residents needs in the market area.

- The YMCA needs to be renovated and expanded but there are limitations based on the site.

- There is limited time available for the use of school gyms for community based sports organizations.

Market Constraints – In addition to the market opportunities, it is also important to analyze possible market constraints. These include.

- The population base in the Primary Service Area is adequate in size with just under 67,000 residents but the facility will have to draw strongly from the Secondary Service Area to perform well financially.

- The demographic characteristics indicate an older population, fewer children and lower recreation expenditure levels. The population is also going to show the greatest growth in the senior age categories in the next five years. These factors have a negative impact on the use of indoor recreation facilities.

- There are a considerable number of private health clubs in the market area with the Capital City Health Club being the flagship of these facilities.

- Lewis & Clark County Fairgrounds has a significant Exhibit Hall and Entry Building that serves as a location for some indoor recreation activities and events.

- Specialty sports such as indoor tennis and ice sports are currently being provided for with existing facilities.

- Funding not only the development but the operation of a new recreation complex will have to be clearly defined.

Section II - Community Input

To gain additional information for a possible Helena Multi-Sport Recreation Complex, a series of focus group/stakeholder meetings were held as well as a community open house. An on-line survey was administered in the greater Helena area as well.

Focus Group/Stakeholder Meetings

On May 3rd and 4th 2016, a series of focus group and stakeholder meetings were held with key groups that might have an impact on the development and use of a Helena Multi-Sport Recreation Complex.

The following is a brief summary of what was heard at each of these sessions with no attempt to validate the accuracy of the comments themselves. Not all questions were asked or responded to by participants in each session.

Aquatic User Groups

Where do you currently go for your indoor and outdoor sports and recreation needs?

East Helena Pool:
- Outdoor, 5 lane with a deep end. It may be covered by a bubble this winter.
- Pay $10.00 per lane per hour

Capital City Health Club Pool:
- Private health club
- 4 lanes of shallow water

YMCA:
- 4 lanes with 9 foot deep end
- 40 years' old
- Pay $12.50 a lane per hour

Cross Roads Fitness:
- Private health club
- 3 lanes lap pool
- 22 yards in length
- Poor H20 quality

Broadwater Hot Springs and Fitness Club:
- Private health club

- Indoor / Outdoor
- Hot Springs, too hot for competitive swimming.

Carroll College:
- Closed a year ago, really the only true competitive pool in the area.
- 6 lanes, 25-yard pool (actually a few inches short)

Memorial Pool:
- Outdoor 50 meter pool
- $75 per hour per practice/2 hours

Do you believe there is a need for a new sports/recreation facility in this community?

- There is a strong demand for an indoor competitive pool.

What specific components should be included in this facility?

- Should be an indoor pool
- Minimum 8 lane x 25 yard
- Second recreation pool for warm-up
- Need to be able to serve kayaking and scuba
- Big deck space
- Seating for 300-600
- Other
  - Weight/cardio
  - Indoor soccer
  - Gym space
  - Community room

Where is the best location for such a facility?

- At the Hot Springs
- Cover the outdoor 50 meter pool
- Fairgrounds
- Near the ice rink
- Near the interstate

Are you willing to pay to use such a facility?

- Limited ability to pay much more than current fees.

How often would you use such a facility if it had the amenities that you desire?

- The facility would be used on a daily basis, should not be just for meets.

What priority would you place on the development of a sports/recreation facility?

- The project is a high priority.

Other issues or concerns regarding the project?

- How will the project be funded?
- Who will own and operate the facility?
- Need to use a TIF district and New Market tax credits for funding.

Business Community

Where do you currently go for your indoor and outdoor sports and recreation needs?

- For basketball tournament, 13-14 gyms are used in town, primarily schools.
- Many of the existing gyms are undersized and not available.

Do you believe there is a need for a new sports/recreation facility in this community?

- Need to be able to host a A-C state high school basketball tournament, need to be able to seat 3,000 to 5,000.
- Helena is centrally located to host tournaments.
- There is a strong need for a competitive pool.
- Indoor track
- The YMCA needs a new facility; they could operate the facility.
- Must be multi-use and more than just sports.
- Need to consider covering Memorial Pool.

What specific components should be included in this facility?

- 4-6 basketball/volleyball courts (at least middle school sized)
- Competitive pool

Where is the best location for such a facility?

- Next to Carroll College

- At the YMCA
- Memorial Park
- Fairgrounds
- In the TIF district downtown.
- Between the airport and East Helena.
- Near Costco
- At the old mall site

What priority would you place on the development of a sports/recreation facility?

- The priority will depend on how it is funded. Public funding will lower the priority.
- Priority is behind schools and public safety.

Other issues or concerns regarding the project?

- Bond issues for schools, a jail and the fairgrounds all have failed in the past and will likely be on the ballot again in the future.
- Financing the project will be an issue.
  - For city of county bond financing, the facility will need to be in town.
  - Fundraising will be important.
- Need to use a TIF district and New Market tax credits.
- Partnerships are essential.
  - School district
  - Carroll College
- Economic impact will need to be determined.

Court Sports

Where do you currently go for your indoor and outdoor sports and recreation needs?

- School gyms
- Fairgrounds Exhibit Building
- East Helena City Hall
- YMCA gym
- Salvation Army gym
- Capital City gym
- High fees are an issue in school facilities and at the fairgrounds.

Do you believe there is a need for a new sports/recreation facility in this community?

- There are a number of court sports groups that could use space.
  - Capital City Volleyball – 180 players
  - Roller Derby – 30-40 members
  - YMCA – 2,000 kids in activities
  - Basketball – 1,600 kids
  - Adult Volleyball – 70-80 players
- Specific issues with existing facilities include:
  - Many gyms are too small and have too low of a ceiling.
  - Availability of gyms
  - Fees for use
  - Lack of spectator space

What specific components should be included in this facility?

- 6-8 basketball/volleyball courts (at least middle school sized)
- Seating for up to 6,500
- Other
  - Weight room
  - Community rooms
  - Concessions/kitchen
  - Changing rooms
  - Indoor playground

Where is the best location for such a facility?

- In town near Centennial Park
- Near other recreation amenities
- Out in the growth area of the community
- Will need free land
- Must have enough parking

Are you willing to pay to use such a facility?

- Limited ability to pay much more than current fees.

How often would you use such a facility if it had the amenities that you desire?

- The facility would be used on a regular basis.

What priority would you place on the development of a sports/recreation facility?

- The project is a high priority.

Other issues or concerns regarding the project?

- Need to serve the local needs first and smaller tournaments.

Carroll College

Where do you currently go for your indoor and outdoor sports and recreation needs?

- The college closed the indoor 6 lane x 25 yard competitive pool a little over a year ago due to structural issues. This was the only true competitive pool in the community.
- The college is currently building a new student recreation center that will have the following amenities:
  - Gym
  - Fitness center
  - Racquetball courts
  - Climbing wall
  - There will be no general public access

Do you believe there is a need for a new sports/recreation facility in this community?

- The college could use the following spaces:
  - 2 more basketball/volleyball courts
  - More space for sports camps
  - Competitive track (200 or 300 meter)
  - Fieldhouse (turf)
  - Golf hitting stations
- Community needs include:
  - Gym space
  - Gymnastics/wrestling
  - Arena
  - Aquatics with competitive and recreational pools
  - Batting cages
  - Place to host concerts and events

What specific components should be included in this facility?

- 6-8 basketball/volleyball courts

- Arena with 5,000 seats
- Competitive pool (at least 8 lanes x 25 yards) and a recreational pool
- Fieldhouse with turf

Where is the best location for such a facility?

- The site does not have to be next to the college.
- The old mall site
- Out in the growth area of the community
- Will need free land
- Must have enough parking

Other issues or concerns regarding the project?

- The college could be an equity partner in the project but it would take a year or more to determine possible levels of funding.
- The community is more likely to vote to fund this type of facility rather than a jail or schools.
- This will be a quality of life issue.

City of Helena Parks & Recreation

What is the City's role in providing indoor recreation facilities?

- Parks & Recreation is not a typical department. They have mostly focused on parks rather than recreation. They are trying to become more recreation oriented.
- The county does not have a parks and recreation department.
- The YMCA is the primary youth recreation provider.

Do you believe there is a need for a new sports/recreation facility in this community?

- There is a need for more sports fields, especially for baseball.
- Competitive and recreational pool.
- Consider covering Memorial Pool as an option.

Where is the best location for such a facility?

- Needs to be in the city if the facility is going to serve local needs.
- City has land near the airport.
- Mall site

Is the community willing to pay to use such a facility?

- Fees will have to be affordable.

Other issues or concerns regarding the project?

- Must serve families, seniors and youth.
- Needs to serve the low income areas of the community.
- Needs to have more than a competitive focus, it needs to serve general recreation needs.
- Strong consideration should be given to forming a park district that encompasses a 10 mile radius of the city. The city would not support a city wide bond to build the center.
- The city does not have a formal position on partnering on the project.

YMCA

What is the YMCA's role in providing indoor recreation facilities?

- The YMCA building was constructed on city land in 1971. The building is next to the landfill and methane is an issue. The center is 23,000 SF and includes a fitness area, 4 lane lap pool, gymnasium and drop-in child care space.
- All capital improvement dollars go to deferred maintenance rather than long range building renovations or expansions.
- Have plans to do a renovation and expansion but need $5-$7 million. They would like to remain at the same site.
- The Y has a big emphasis on childcare and early learning in addition to youth sports.

Do you believe there is a need for a new sports/recreation facility in this community?

- New exercise/fitness space will cannibalize what is already in the community.
- An indoor turf facility
- Teen center
- Senior space
- Indoor track

What specific components should be included in this facility?

- Gym
- Competitive pool

Where is the best location for such a facility?

- At the current YMCA location if it is possible.
- City has land near the airport.

Other issues or concerns regarding the project?

- The Y is interested in a possible partnership on the facility. They could operate the facility and could be absorbed into the new center. The Y would be willing to possibly put capital dollars into the complex to add the elements that they think are important.
- While the facility could have a tournament focus, it needs to be more about serving local needs.
- The possibility of enclosing Memorial Pool will need to be investigated.

Lewis & Clark County/Fairgrounds

What is the County's role in providing indoor recreation facilities?

- The County's only recreation facility is the fairgrounds. They host 400 events a year and are basically booked. Organizations are always looking to do events and sports activities there. Trade shows are a major area of focus and they want to do more concerts and events in the future. Could possibly build an indoor arena for this.

- The fairgrounds goal is to be self-sufficient so they have high fees for use.

Do you believe there is a need for a new sports/recreation facility in this community?

- The YMCA needs to be replaced and they may not even need a building in the future.
- There is a strong need for a competitive pool.
- Court space is always in demand for practices, games and tournaments.
- Athletic fields are also needed

What specific components should be included in this facility?

- Gym
- Competitive pool

Where is the best location for such a facility?

- Fairgrounds, but the facility must fit within their deed restrictions. They would have 10-15 acres available. Traffic and access issues would need to be solved.
- Near the airport
- Runkle site (near new Blue Cross/Blue Shield building)

Other issues or concerns regarding the project?

- The County does not anticipate having any financial role in the project.
- The project will need to have a capital campaign to raise funds.
- The County will not support the formation of parks and recreation district until the jail issue is solved. They also believe that a school bond will need to be passed before any public financing will be considered for the project.
- Consideration should be given to repurposing the YMCA building for this project and covering Memorial Pool.
- The project needs to focus on serving the local community first.

Helena Public Schools

What is the School's role in providing indoor recreation facilities?

- The School's gyms are used on a regular basis by a variety of sports and recreation programs and activities. The most seating that they can accommodate is 2,200.
- There is not enough gym space for school programs right now. There are only two high school gyms and they have to use middle school and even elementary school gyms for practices.
- School swim teams have to use the Y for practices. They currently have a total of 50 swimmers. Could go up to 100 swimmers with a new pool.
- The Schools could also use additional space for physical education.

Do you believe there is a need for a new sports/recreation facility in this community?

- Need for more gym space
- Loss of the Carroll College pool really hurt competitive swimming.
- Wellness/fitness space
- Fieldhouse for field sports, a track and batting cages
- The biggest need is not a tournament/event facility

What specific components should be included in this facility?

- Gymnasium space

- Competitive pool – 8 lane by 25 yard with seating for 300
- Indoor turf space

Where is the best location for such a facility?

- Needs to be close to one of the schools
- YMCA site
- Fairgrounds

Other issues or concerns regarding the project?

- The School's possible financial involvement is not known but they would have to pass their own bond issue before considering this project. It is more likely that they would contribute capital dollars than operational assistance.
- The School could possibly support a parks and recreation district.
- The project needs to more than a pool and athletic facilities.
- Should consider covering Memorial Pool.
- Do not plan to attract the state swim meet on an annual basis. It moves around every 2-3 years. A new pool needs to support local meets.
- The School's will likely go out for another bond in the next year but there will not be any money for more gyms.

Other Communities

This meeting was attended by representatives from the City of East Helena, East Helena Public Schools, and Clancy Public Schools.

What is your organization's role in providing indoor recreation facilities?

- The City of East Helena's outdoor pool is used extensively by competitive swim teams. The swim team is investigating the possibility of bubbling over the outdoor pool for year around team use. The gym in their City Hall is also used by sports groups.
- Clancy Schools have one park and a small gym.
- The Schools have limited gym space for their own programs.

Do you believe there is a need for a new sports/recreation facility in this community?

- There is a big demand for gym space and a competitive pool.
- The competitive pool must be able to support meets.
- The project needs to attract people from out of town and support tournaments.

- Fieldhouse for field sports.

What specific components should be included in this facility?

- Gymnasium space
- Competitive pool
- Indoor turf space

Where is the best location for such a facility?

- East Helena
- Easy access from highway 12
- People will drive to Helena proper if necessary
- Consider a site between Helena and Montana City.

Other issues or concerns regarding the project?

- None of the organizations see themselves as having direct financial involvement in the development or operation of the complex.
- Bonding for the project will be a tough sell.
- It will be difficult to raise money for the project as well.

Track & Field Sports

Where do you currently go for your indoor and outdoor sports and recreation needs?

- School gyms
- Health Club-gyms and pools
- East Helena Outdoor Pool
- YMCA
- Memorial Pool
- East Helena City Hall

Do you believe there is a need for a new sports/recreation facility in this community?

- There is a big need for gym space – there is not any available time in existing gyms.
- There needs to be indoor turfed area.
- Need for a competitive pool – must use the Y and health club pools now.
- Need space for large dance competitions.
- Should be able to host swim meets and tournaments.

What specific components should be included in this facility?

- Gymnasium with multiple courts
- Elevated track
- Indoor turfed field – no dasher boards
- Competitive pool
- Competitive track – 200-300 meter track

Where is the best location for such a facility?

- Mall site
- Fairgrounds
- Site near the interstate
- East Helena – near the new Blue Cross/Blue Shield building
- Any site needs good trail access

Are you willing to pay to use such a facility?

- There is a willingness to pay for use.

How often would you use such a facility if it had the amenities that you desire?

- The facility would be used on a regular basis.

What priority would you place on the development of a sports/recreation facility?

- The project is a reasonably high priority.

Other issues or concerns regarding the project?

- Need to serve the local needs first and smaller tournaments.

VA Hospital and Health Advocates

Do you believe there is a need for a new sports/recreation facility in this community?

- There is a strong need for a facility of this nature.
- Needs to serve the disabled.
- Need to be able to support tournaments and other events.

- Helena College – would like to see a facility to meet their student needs. They may be able to access as student fee for use.

What specific components should be included in this facility?

- Competitive pool
- Therapy pool – similar to Eagle Mountain in Bozeman
- Indoor turf field area
- Walk/jog track
- Gym space
- Community ice rink

Where is the best location for such a facility?

- Near the existing ice arena
- Close to Helena College – important if student funding is going to be used.

Other issues or concerns regarding the project?

- Would support the formation of a parks and recreation district to fund the project.

City and County Parks Advisory Board

The project team attended this regularly scheduled meeting on May 4th to gain some quick input on the project.

General comments included:

- There is a need for this type of project in the community.
- The facility needs to have an economic impact on the area and draw visitors to the community.
- Concern was expressed regarding how the project would be financed.

Open House

A community open house was held on the evening of May 4th for the community to express their opinions or concerns regarding the Helena Multi-Sport Recreation Complex project. Many of the participants in the focus group/stakeholder meetings were present.

General comments included:

- There is a definite need for this type of facility and there is strong support for the project.
- The complex needs to focus on the local market.
- The ability to host some tournaments is important.
- The facility must be affordable.
- The complex must have a multi-generational appeal.
- Transportation and accessibility will be important.
- This facility should not compete with other providers.

Summary of Findings:

The general findings from the focus group/stakeholder meetings and open house were:

- Existing aquatic, sports and fitness facilities that are being used include:
  - YMCA
  - Private health clubs
  - Fairgrounds
  - School gyms
  - Memorial pool
  - East Helena pool and gym
- There is a definite need for an indoor sports facility.
  - The closure of the Carroll College pool eliminated the only true competitive pool.
  - The need for additional gym space is acute.
  - The community would like to see an indoor turfed field.
  - The facility will need to be regional in nature.
  - The facility needs to serve local needs and area tournaments but does not need to attract large regional or national tournaments or meets.
  - Must be more than just a sports facility and needs to have a multi-generational appeal.
- Specific amenities need to include:
  - Top Priority
    - Competitive pool – at least 8 lane by 25 yard with seating of approximately 500.
    - Recreational pool
    - Gymnasium with a minimum of 4 courts
  - Second Priority
    - Fieldhouse with indoor turf field
    - Track – walk/jog track
  - Lower Priority
    - Competitive track -200-300 meter
    - Community rooms

- The preferred site options are:
  - YMCA (Centennial Park area)
  - Fairgrounds
  - Airport area
  - Mall
  - Near the interstate
  - The site will depend on the funding mechanism and potential equity partners.
- There is a willingness to pay fees for use but they must be affordable.
- The facility would be well used if the amenities noted are included and the fees are acceptable.
- The project is a reasonably high priority, but overall timing is a concern.
- Other issues include:
  - Funding is a primary concern
    - Bond funding will be difficult and will likely need to come after the jail and school bond funding effort.
    - Will need to continue to explore the formation of a parks and recreation district.
    - Non tax funding will be important.
  - The economic impact of the facility on the Helena area will need to be determined.
  - Determining who will operate and manage the facility will be important.
  - The future of the YMCA building will impact the project.
  - There are a number of potential equity partners:
    - Carroll College
    - YMCA
    - Helena College
  - Will need to explore the viability of covering Memorial Pool.

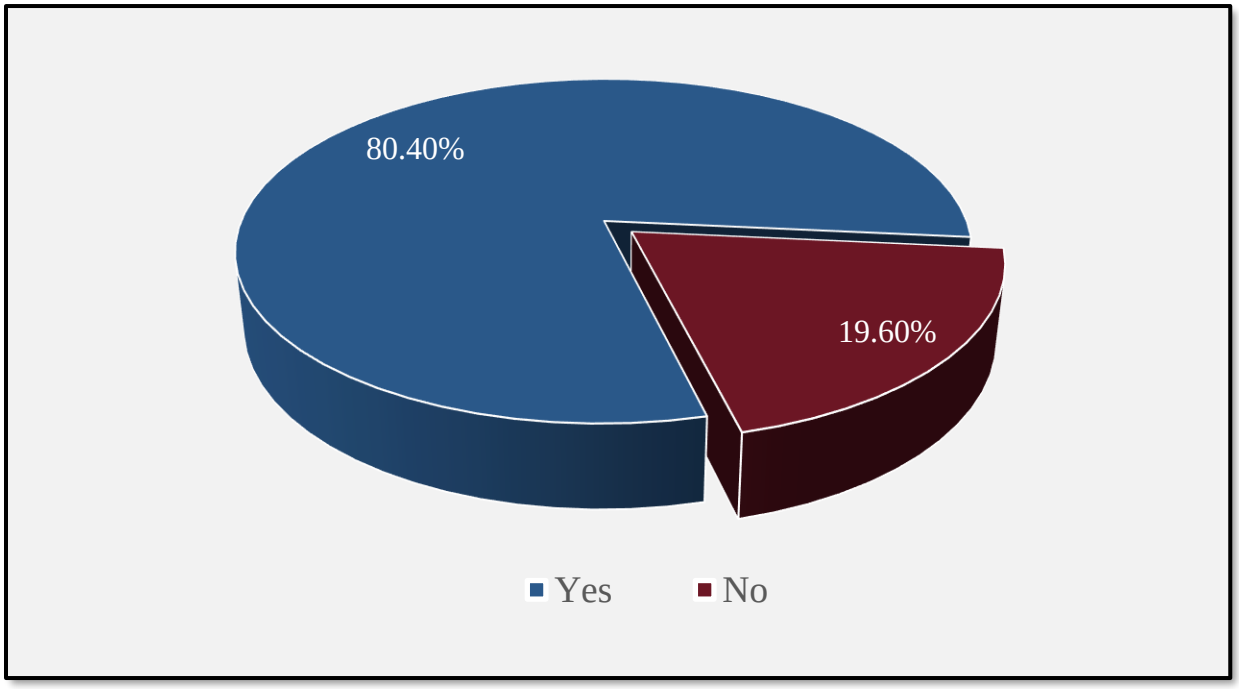
On-line Survey

A key aspect of the community input process for the Helena Multi-Sport Recreation Complex was the completion of an on-line survey for residents of the greater Helena area. The survey was available for response for approximately three weeks in June, 2016. A total of 862 surveys were completed.

The following pages contain a summary of the survey by each question plus there is a brief analysis of the data by key response categories.

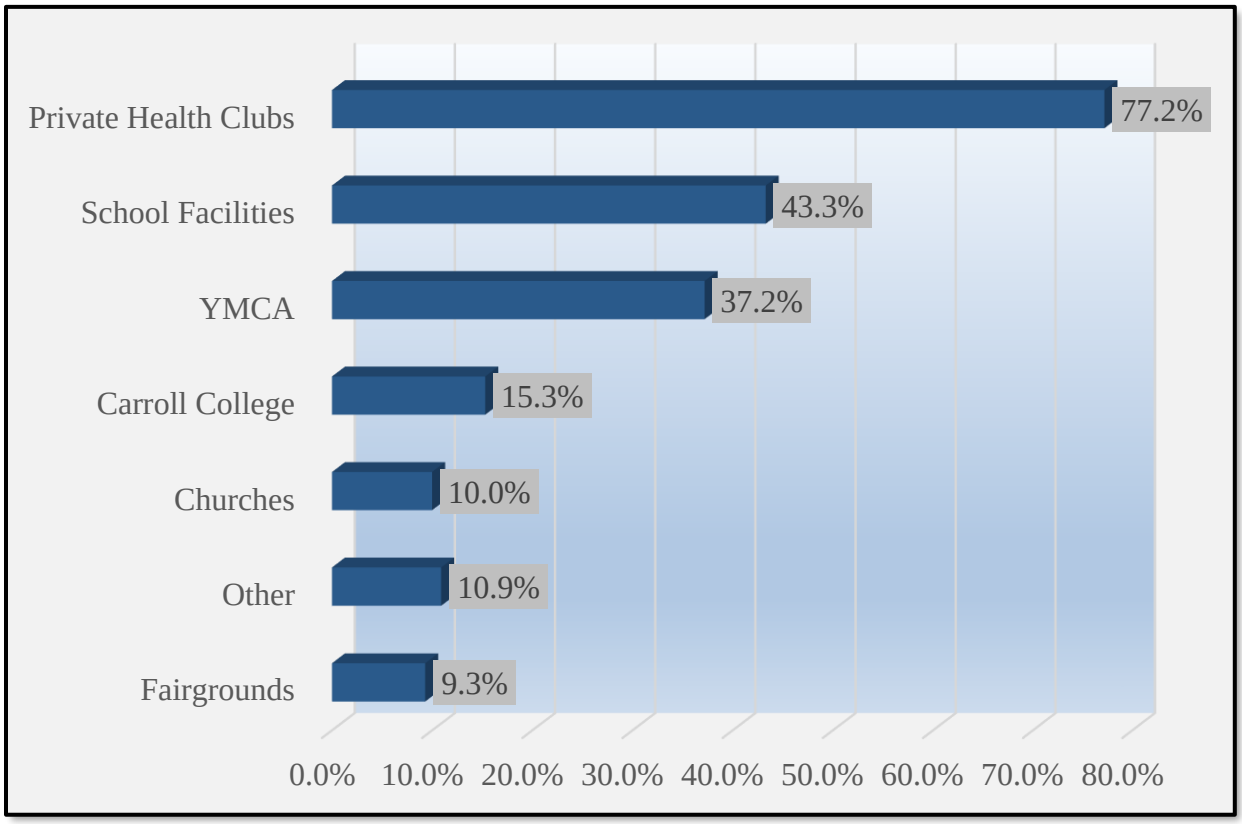
Question #1

- When asked if you or others in your household currently use INDOOR aquatic, sports or fitness facilities, 80.4% of respondents indicated that they DID use facilities while 19.6% indicated that they DID NOT.



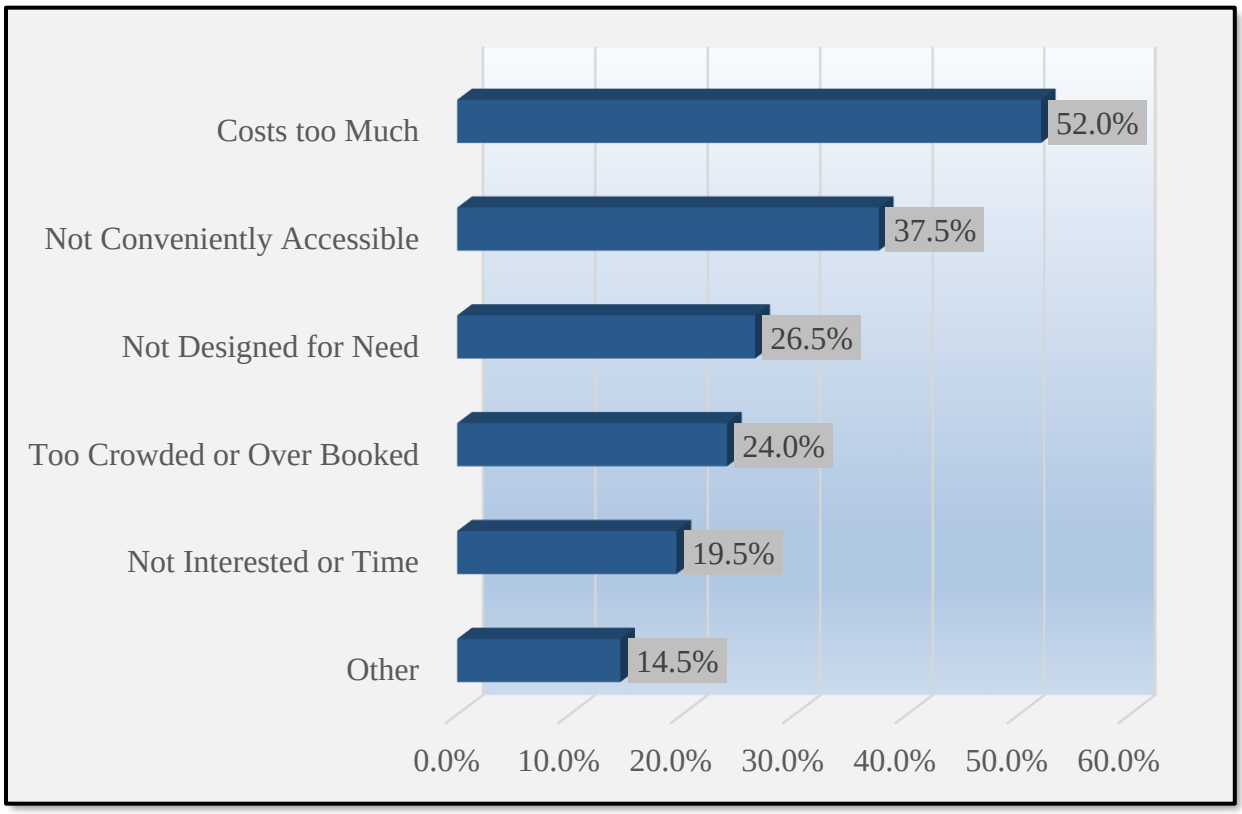
Question #2

- The top three facilities that respondents DO use are:
  - Private Health Clubs 77.2%
  - School Facilities 43.3%
  - YMCA 37.2%



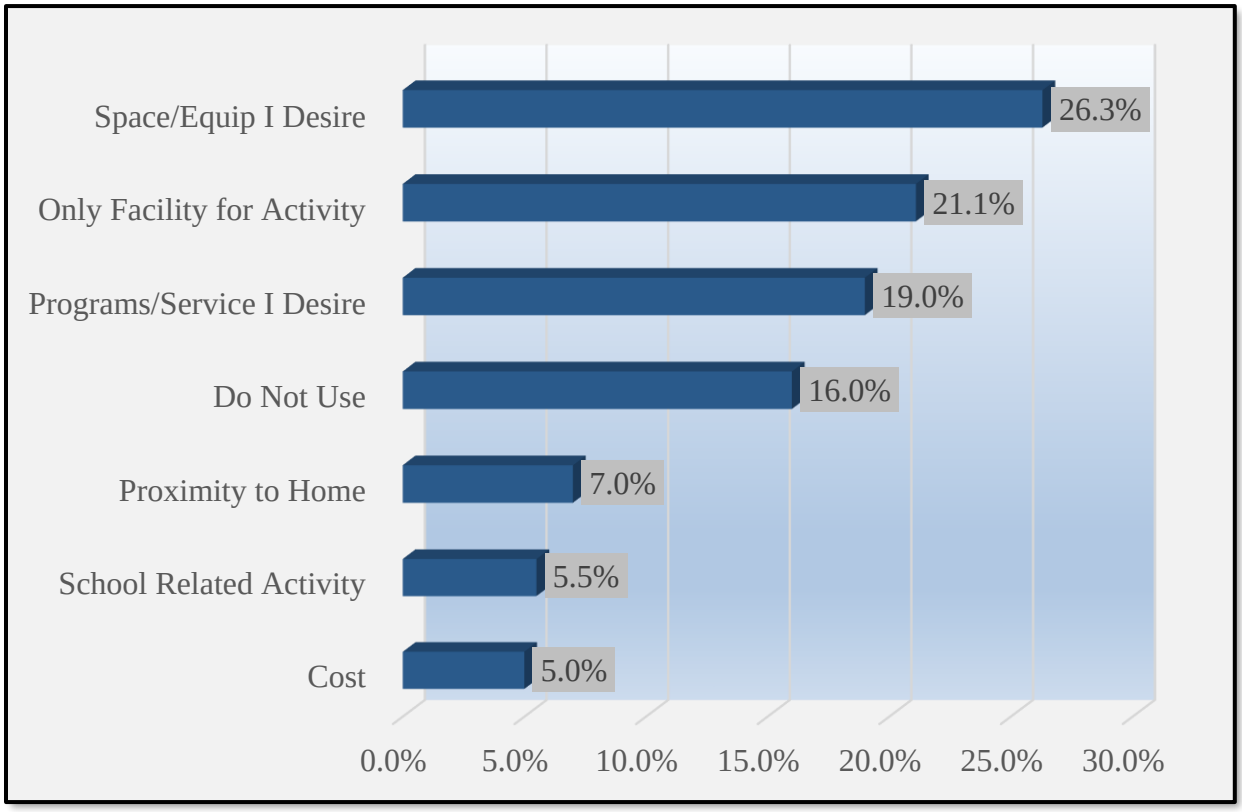
Question #3

- The top three reasons that individuals DO NOT use facilities are:
  - Costs too much 52.0%
  - Not conveniently accessible 37.5%
  - Existing facilities are not designed for the kind of activities 26.5%



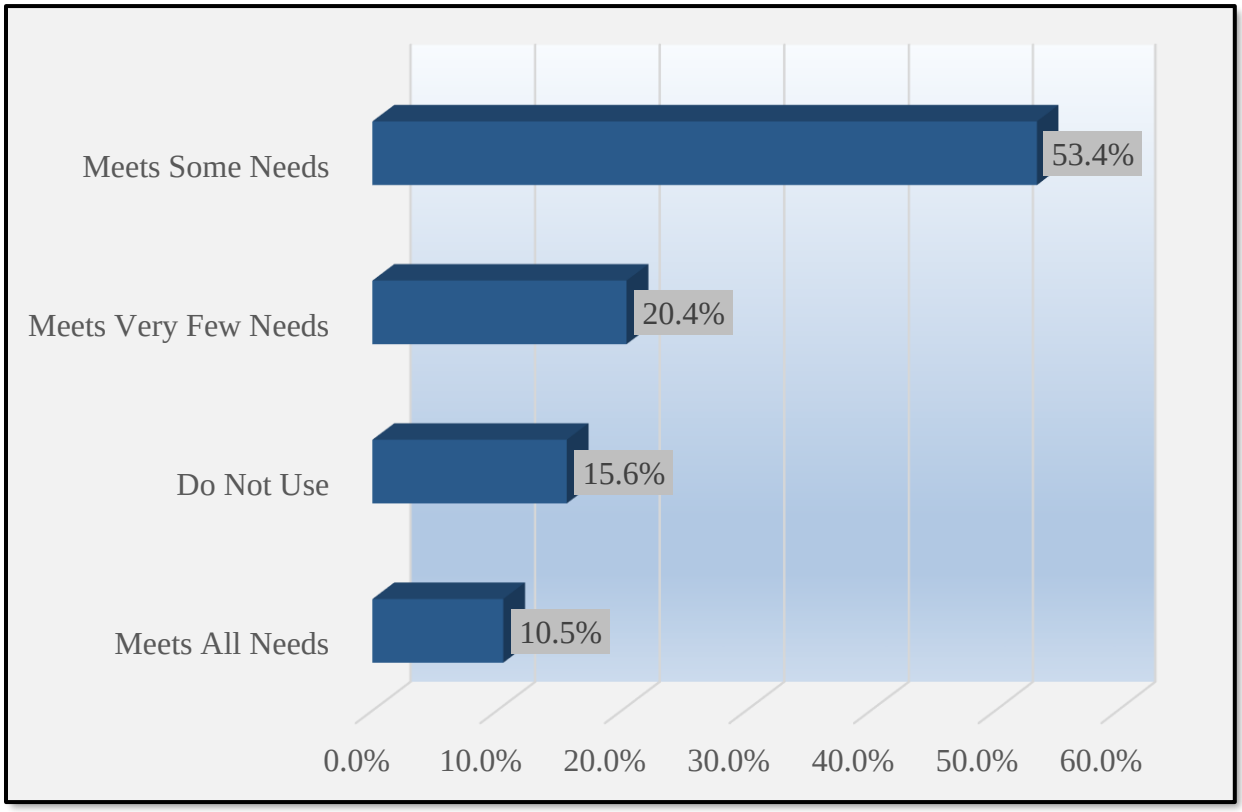
Question #4

- The top two reasons that households use these aquatic, sports or fitness facilities are:
  - Facility has the spaces and equipment that I desire 26.3%
  - Only facility available for my activity 21.1%



Question #5

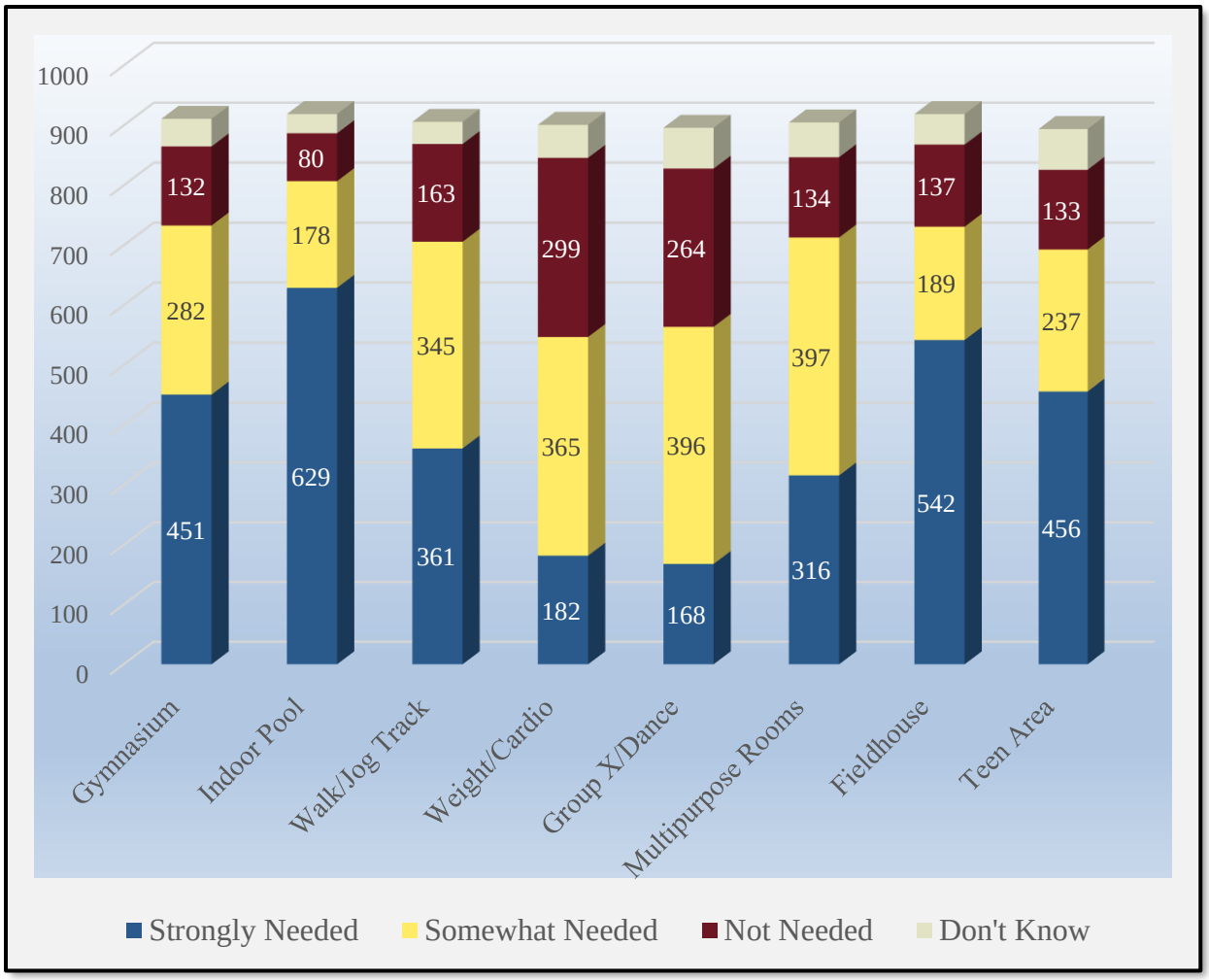
- The most frequent statement that best represents how existing indoor aquatic, sports or fitness facilities that you are currently using meets your household's needs?
  - Meets some of our needs 53.4%



Question #6

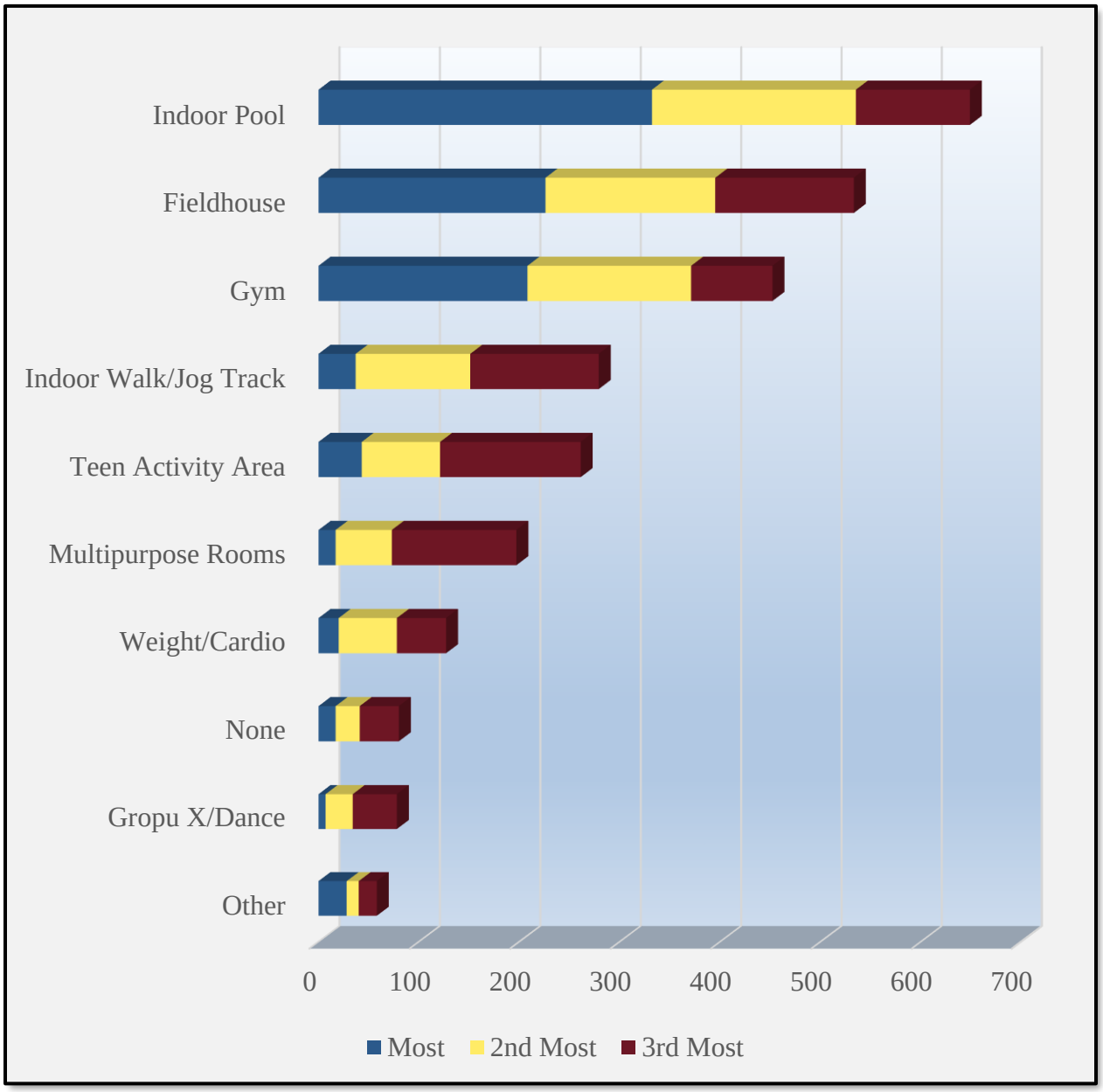
- The following components were identified and asked about the "need" within the community.

	Strongly	Somewhat	Not Needed	Don't Know
• Gymnasiums	451	282	132	46
• Indoor Swimming	629	178	80	32
• Indoor Walk/Jog	361	345	163	37
• Weight/Cardio	182	365	299	55
• Group Ex/Dance	168	396	264	68
• Multipurpose Rooms	316	397	134	58
• Fieldhouse	542	189	137	51
• Teen Activity	456	237	133	68



Question #7

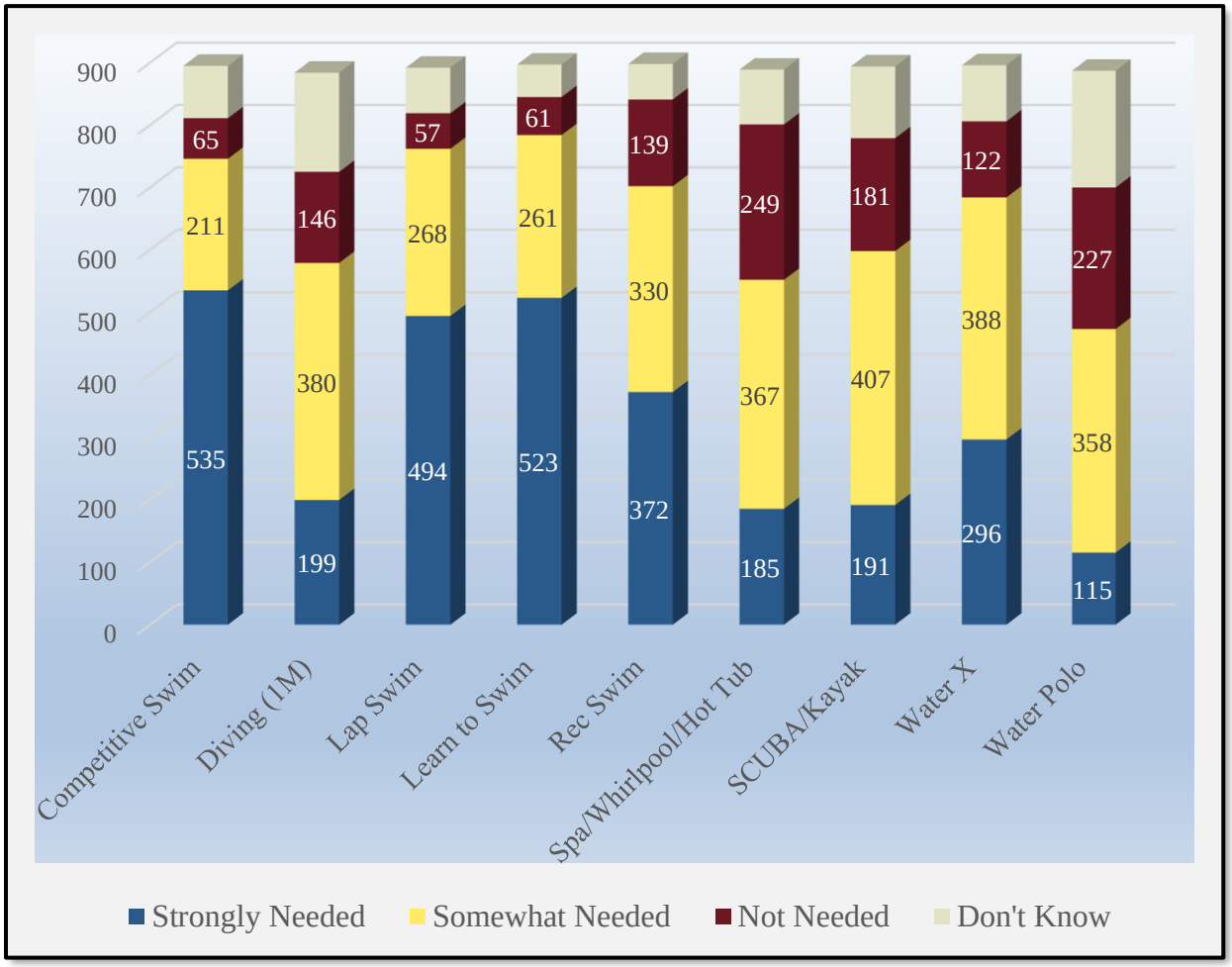
- When asked to rank the facility components as MOST NEEDED the following top responses were received.
  - Most Needed — Indoor Swimming Pool — 332
  - 2nd Most Needed — Indoor Swimming Pool — 203
  - 3rd Most Needed — Fieldhouse — 138



Question #8

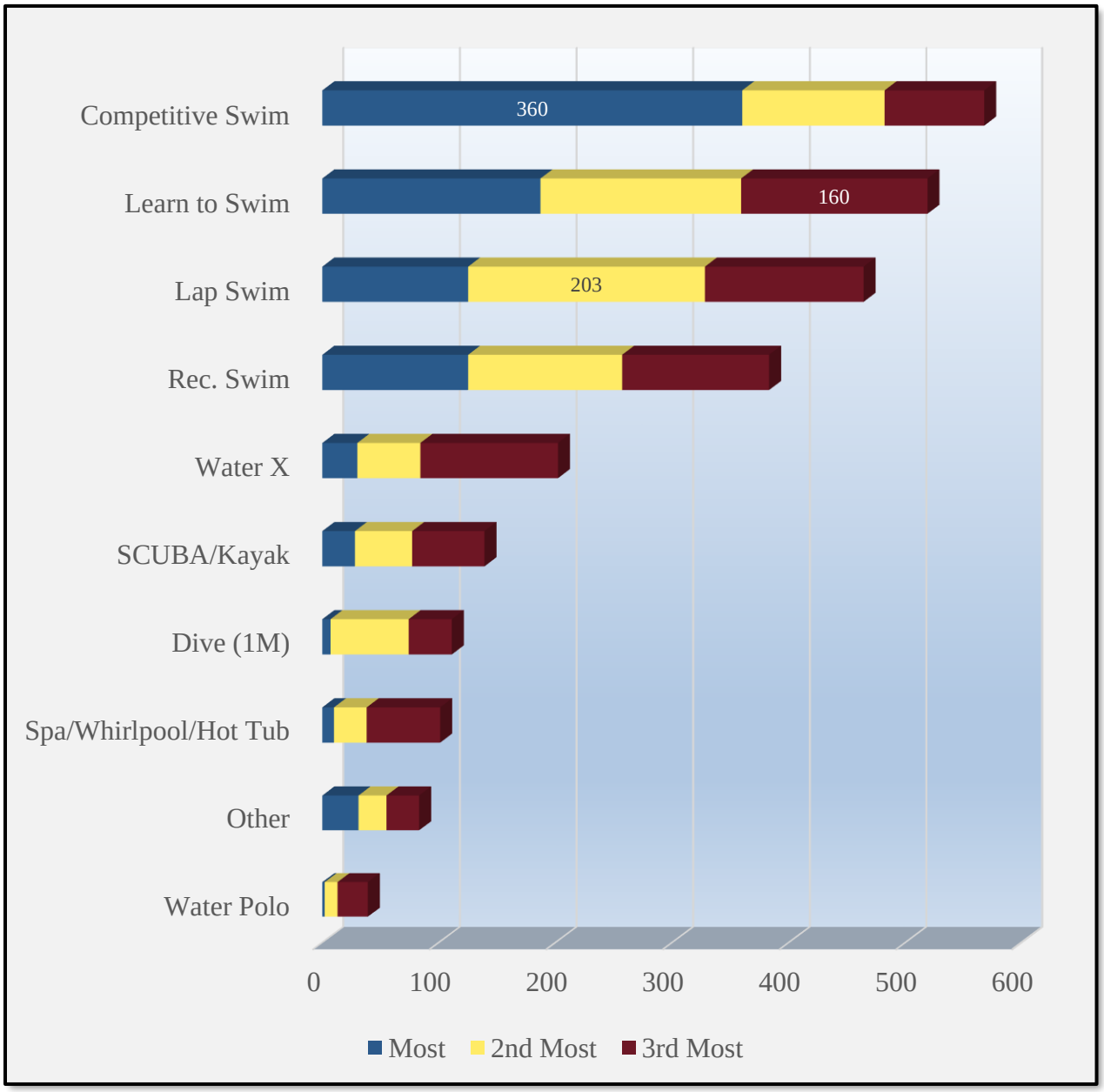
- When asked about various aquatic pursuits that could take place in an indoor pool and the "need" for those pursuits the following responses were received.

	Strongly	Somewhat	Not Needed	Don't Know
• Competitive Swim	535	211	65	84
• Diving (1M)	199	380	146	159
• Lap Swim	494	268	57	73
• Learn to Swim	523	261	61	52
• Rec Swim	372	330	139	57
• Spa/Hot Tub	185	367	249	88
• SCUBA/Kayak	191	407	181	115
• Water Exercise	296	388	122	90
• Water Polo	115	358	227	187



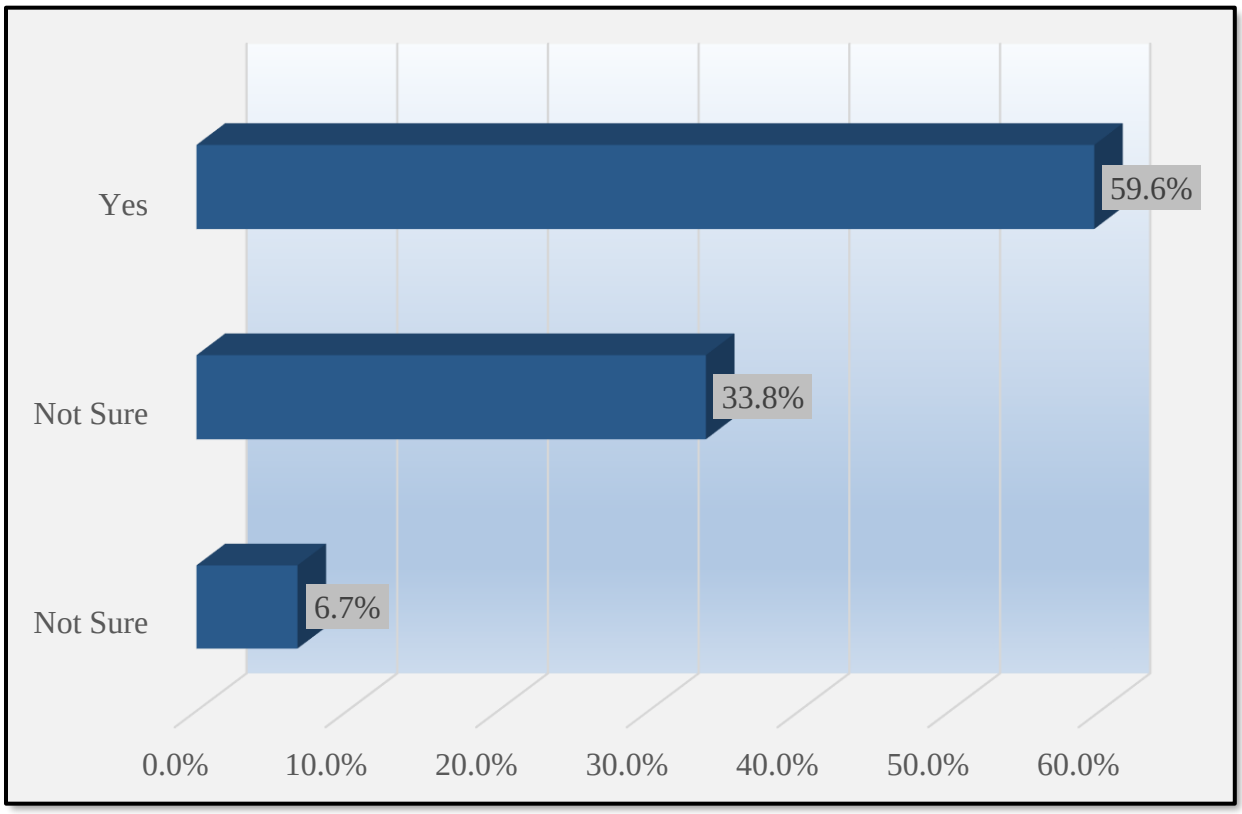
Question #9

- When asked to rank the facility components at MOST NEEDED the following top responses were received.
  - Most Needed — Competitive Swim — 360
  - 2nd Most Needed — Lap Swim — 203
  - 3rd Most Needed — Learn to Swim — 160



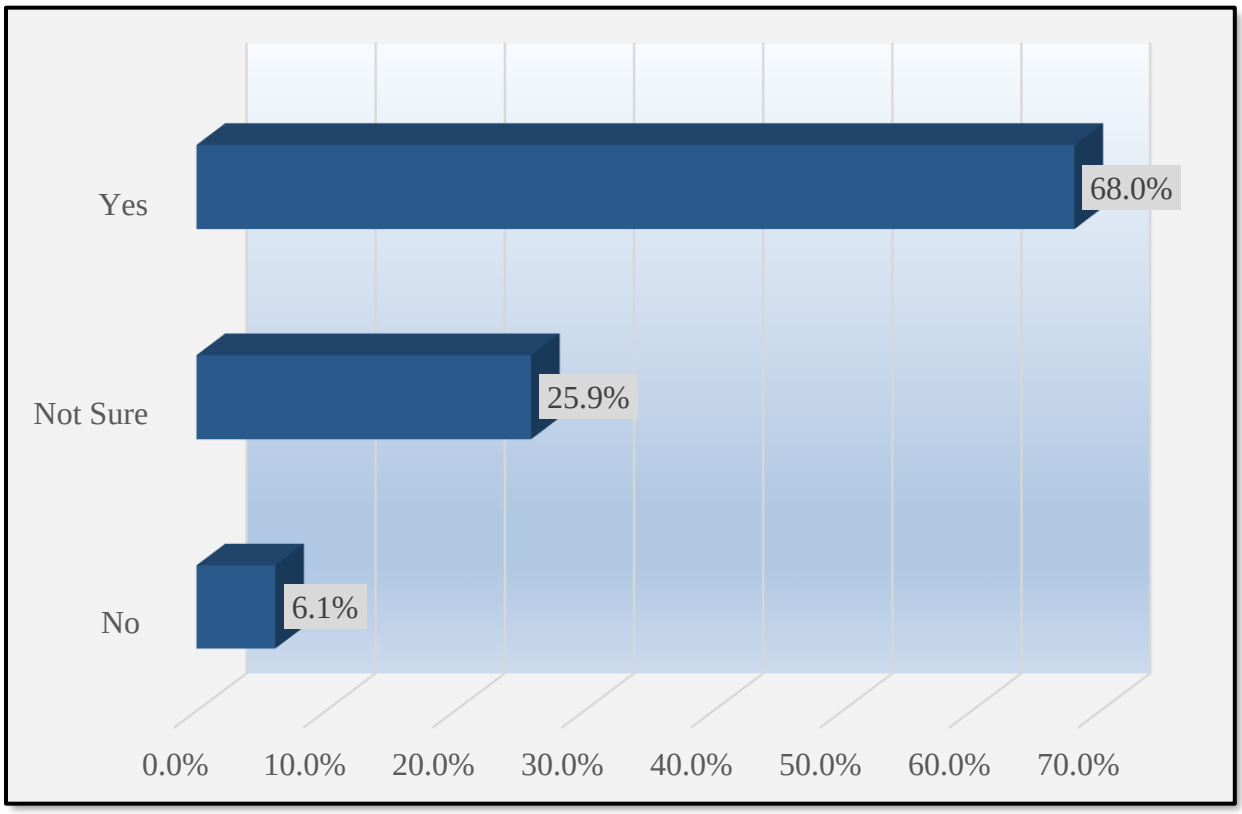
Question #10

- When respondents were asked if they would support an increased tax to help build a facility that met their household needs the following responses were received:
  - Yes 59.6%
  - No 6.7%
  - Not Sure 33.8%



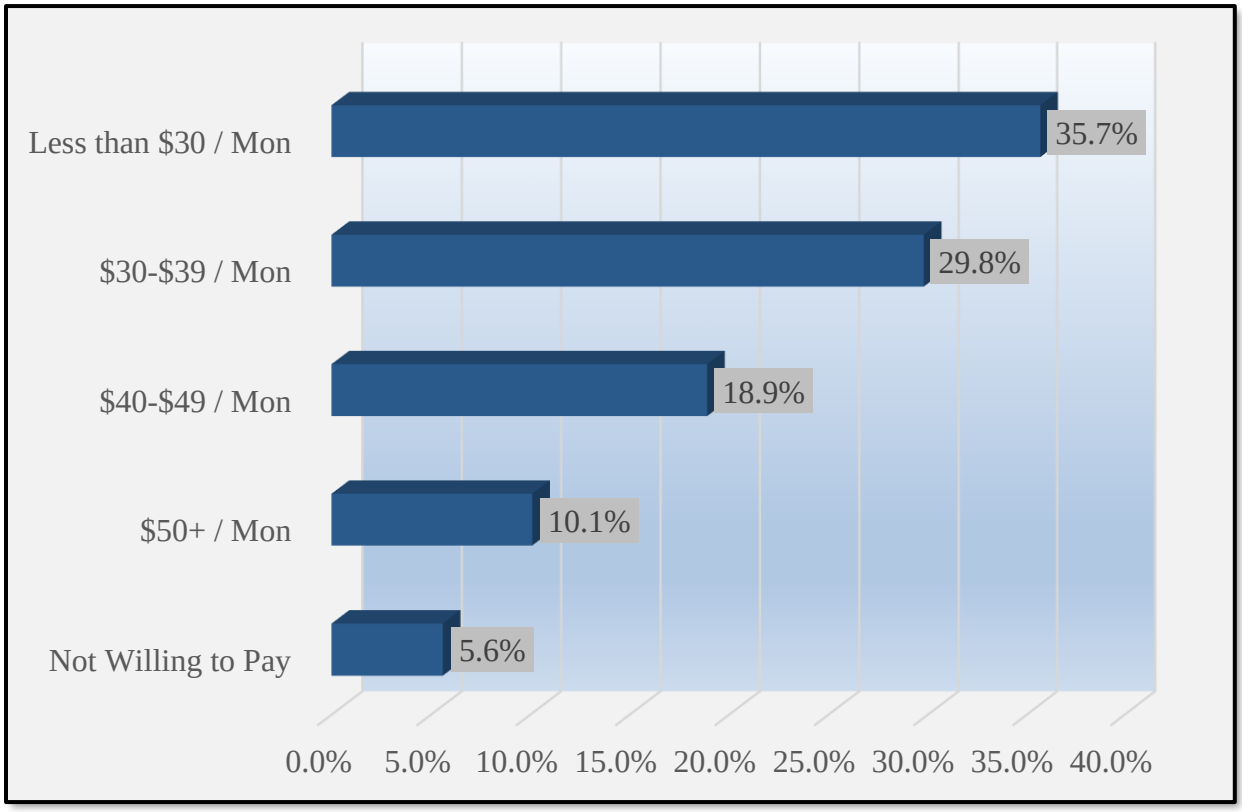
Question #11

- When respondents were asked about the establishment of a special taxing district for a facility of this nature the following responses were received:
  - Yes 68.0%
  - No 6.1%
  - Not Sure 25.9%



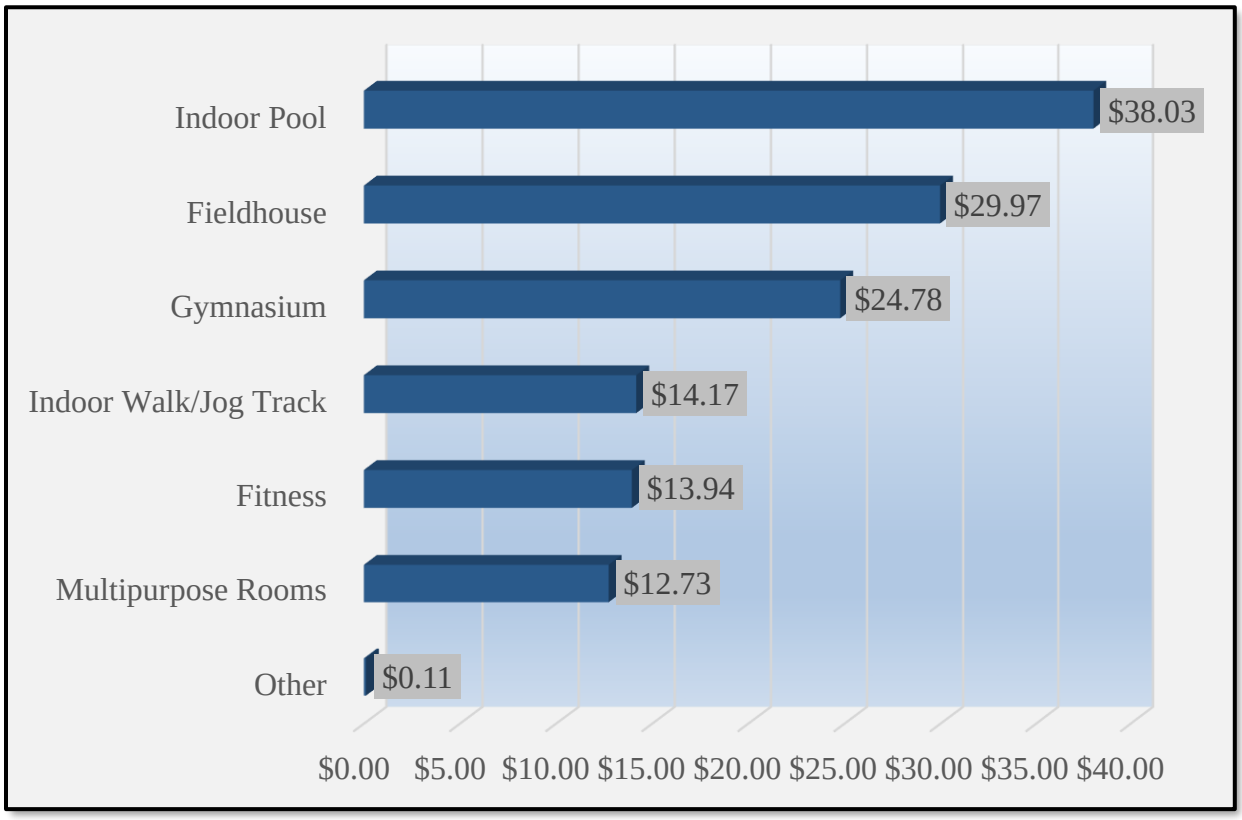
Question #12

- When respondents were asked the maximum amount per month they were willing to pay for a facility that had the amenities they preferred, the most common response is:
  - Less than $30 per Month 35.7%



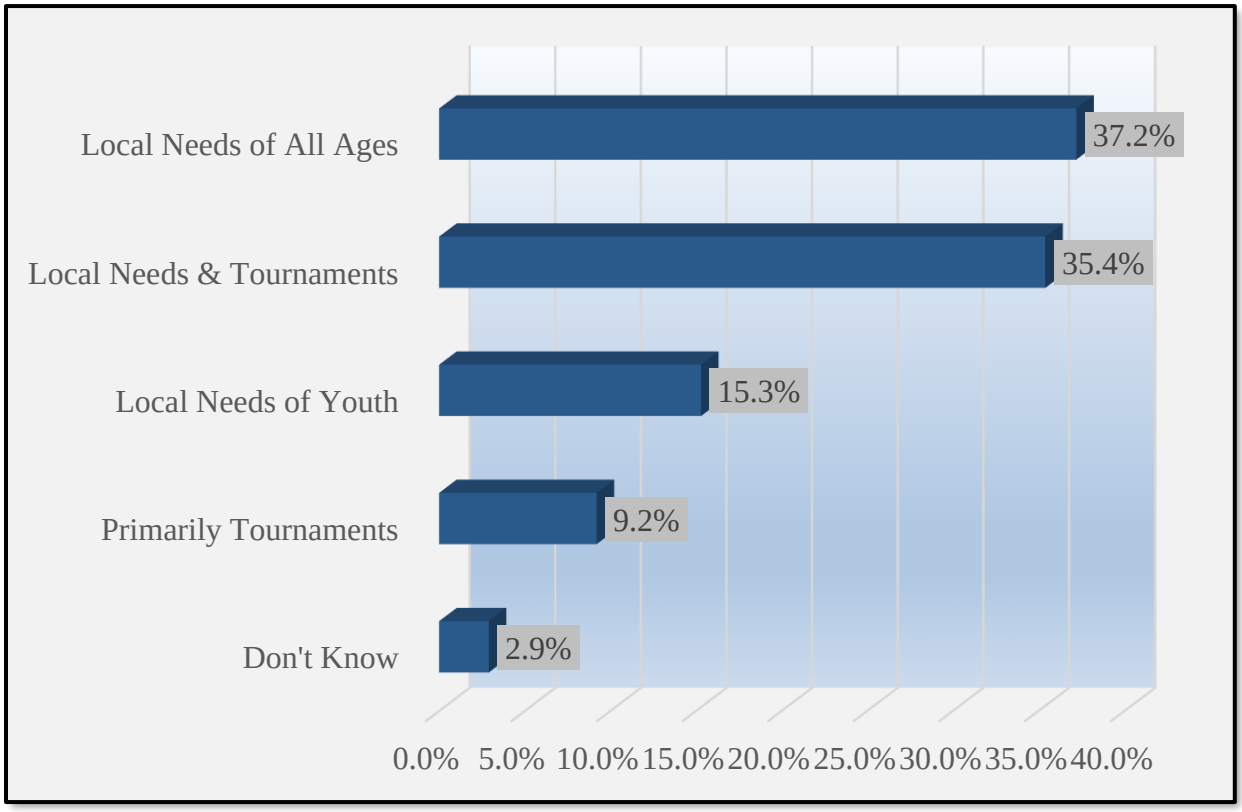
Question #13

- The average amount spent on each facility component is as follows:
  - Indoor Swimming Pool $38.03
  - Fieldhouse $29.97
  - Gymnasium $24.78
  - Indoor Walking/Jogging Track $15.17
  - Fitness $13.94
  - Multipurpose Rooms $12.73



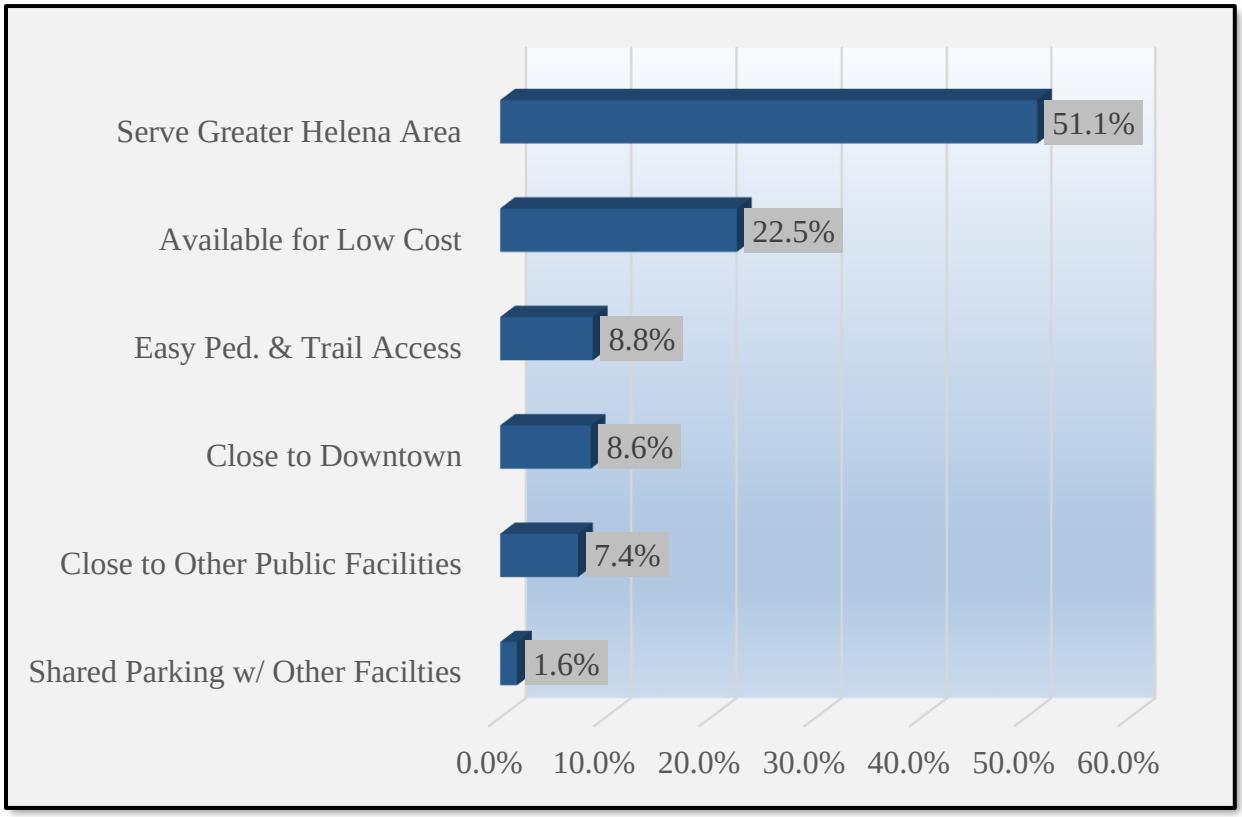
Question #14

- When asked what the primary focus on the aquatic, sports and fitness facility should be the number one response was:
  - Serving local needs of all ages 37.2%



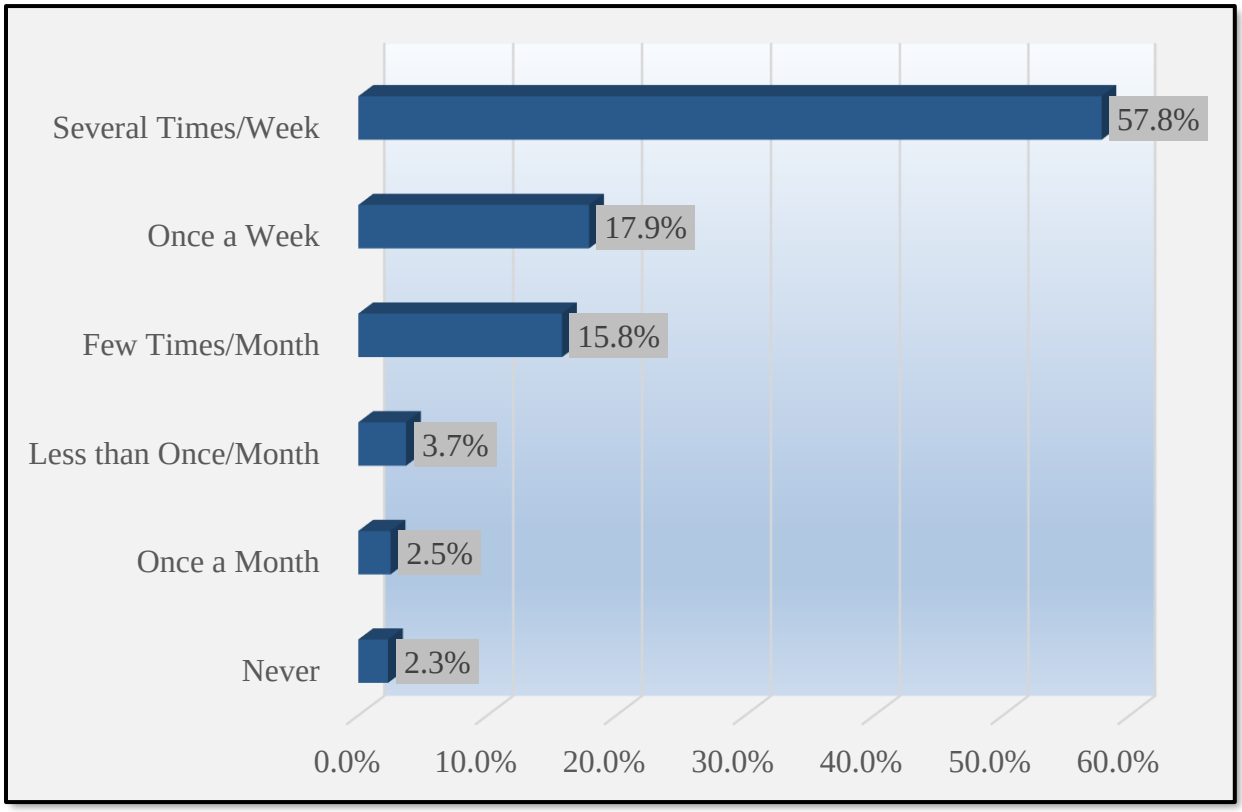
Question #15

- When asked the most important criteria for determining a site for a facility the number one response was:
  - Site that is located to serve the greater Helena area 51.1%



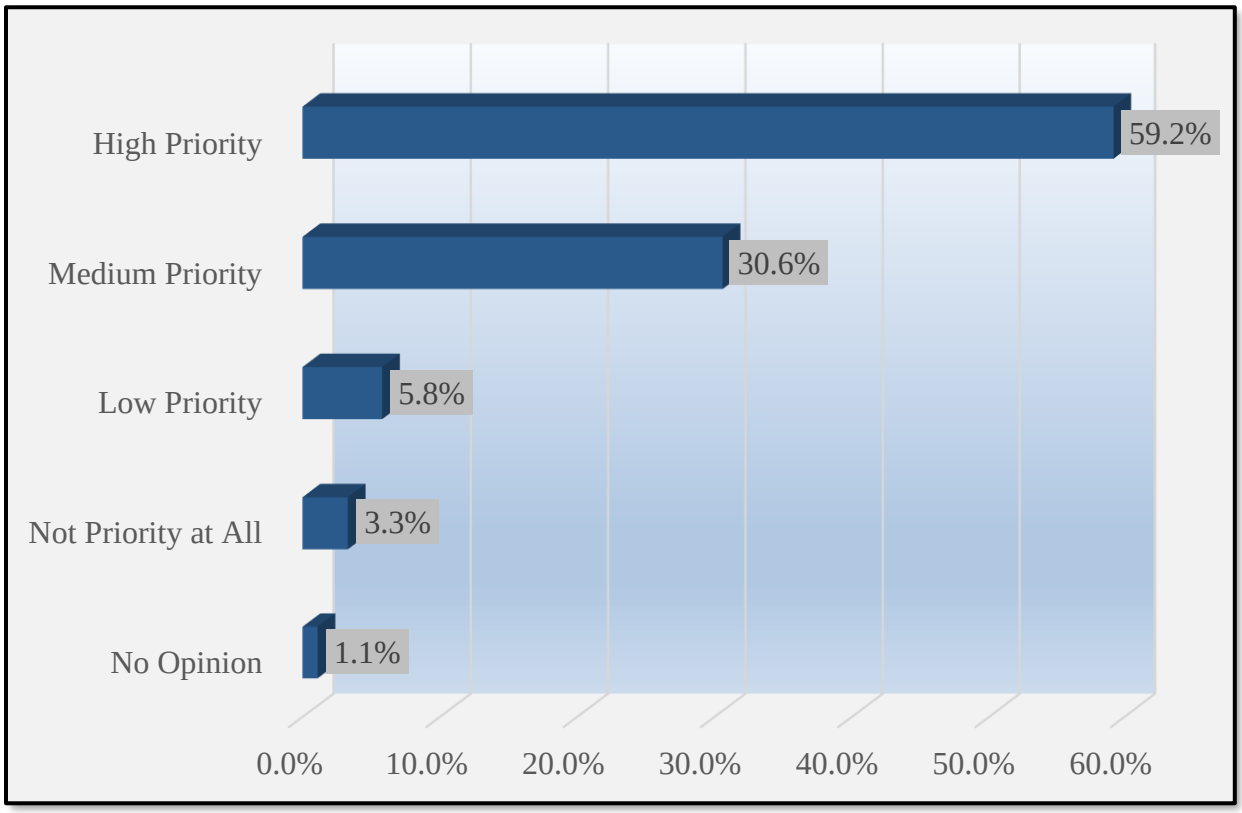
Question #16

- When asked how often households would use a facility if it had the facility components they most desired the following responses were received.
  - Several times a week 57.8%
  - Once a week 17.9%
  - Few times a month 15.8%
  - Once a month 2.5%
  - Less than once a month 3.7%
  - Never 2.3%



Question #17

- When asked how important it is to develop a new indoor aquatic, sports or fitness facility the following responses were received.
  - High priority 59.2%
  - Medium priority 30.6%
  - Low priority 5.7%
  - Not priority at all 3.3%
  - No opinion 1.1%



Demographic Comparisons Between Survey and Census/ESRI Projections

- Responses to the survey were received from the following areas:
  - Helena 52.8%
  - Helena Valley 24.8%
  - East Helena 8.6%
  - Montana City 7.9%
  - Other 3.9%
  - Clancy 2.0%

- Of the responses received; 40.8% were male and 59.2% were female. In comparison from the 2010 Census in the Primary Service Area; 49.3% were male and 50.7% were female.

- When asked the number of individuals in the household within various age groups, the following responses were received:

	Number of Individuals in Household					Total
	1	2	3	4	5	
Under 5	86	36	11	2	2	137
5-12 Years	177	159	36	2	4	378
13-15 Years	214	49	3	0	1	267
16-19 Years	154	46	3	0	1	204
20-25 Years	56	19	1	0	1	77
26-44 Years	128	333	2	0	1	464
45-64 Years	136	296	1	0	1	434
65+ Years	30	21	0	1	1	53
						2,104

- Based upon the Primary Service Area in 2015 the median household income was $57,459 and the average household income was $71,168. The following percentages and income categories were received from respondents:
  - $100,000-$249,999 44.7%
  - $75,000-$99,999 22.3%
  - $50,000-$74,999 16.2%
  - $25,000-$49,999 9.0%
  - $250,000+ 5.1%
  - Under $25,000 2.7%

In addition to the overall results of the survey B*K completed cross-tab analysis of the following groups:

- Male v. Female
- Income under $50,000 v. Income $50,000-$99,000 v. Income over $100,000
- Seniors Age 65+
- Youth Under 16 in Household
- Place of Residence – Helena v. Helena Valley v. East Helena v. Montana City

Cross-tab Summary

There was a great deal of consistency amongst the cross-tab analysis

- The majority of respondents ARE using some form of indoor facilities and the most commonly used are Carroll College, Fairgrounds, School, Private Health Clubs and Churches (in no particular order).
- For those that are not using indoor facilities common responses were; not something that I'm interested in, cost and other (in no particular order).
- An area where there was some significant variation was the reason that individuals used indoor facilities. Some common responses were cost and school related activities.
- Most groups using facilities indicated that the facility met MOST of their needs.
- The three facility components that were felt to be the STRONGEST need were; Indoor Pool, Gymnasium and Fieldhouse. There were also some groups that placed Indoor Walk/Jog Track and Teen Activity Area in their top 3.
- With regards to aquatics Competitive Swimming, Lap Swimming and Learn to Swim were consistent in the top 3 STRONGEST need.
- There was very strong, positive response for the potential of tax support as well as the development of a special district to support the facility.
- Most respondents were not willing to pay more than $39/month for a membership.
- The criteria for determining location of a facility was somewhat split with a site that served the greater Helena market being a common choice.
- Most groups indicated that the development of such a facility should be a high priority and that if the facility included the amenities they preferred their household would use said facility multiple times per week.

Male v. Female

- When asked if you or others in your household currently use INDOOR aquatic, sports or fitness facilities 83.5% of male respondents and 82.9% of female respondents indicated that they DID use indoor facilities.

- The top three facilities that male respondents DO use are; Fairgrounds, Private Health Clubs and Carroll College. While the top three facilities that female respondents DO use are; Churches, School and YMCA.

- The number one reason that men DO NOT use indoor facilities is because it is not something my household is interested in or has time for. The number one reason that women DO NOT use indoor facilities is because of cost.

- The top two reasons that men use these aquatic, sports or fitness facilities are; facility has the spaces and equipment desired and cost. The top two reasons that women use these aquatic, sports or fitness facilities are; school related activities and cost.

- The most frequent statement that best represents how existing indoor aquatic, sports or fitness facilities that you are currently using meets your household's needs according to men and women, meets some of our needs.

- The following components were identified as "strongly needed" by survey respondents. According to male respondents the top three strongest needs were; indoor pool, fieldhouse and gymnasium. According to female respondents the top three strongest needs were; indoor pool, fieldhouse and teen space.

- When asked about various aquatic pursuits that could take place in an indoor pool the following were identified as the most "strongly needed." According to male respondents the top three strongest needs were; competitive swimming, learn to swim and lap swimming. According to female respondents the top three strongest needs were; learn to swim, lap swimming and competitive swimming.

- When respondents were asked if they would support an increased tax to help build a facility that met their household needs the following responses were received, 63.6% of male respondents and 58.2% of female respondents indicated that they would support such an increase.

- When respondents were asked about the establishment of a special taxing district for a facility of this nature 69.3% of men and 68.2% of women indicated they would support a special taxing district.

- When respondents were asked the maximum amount per month they were willing to pay for a facility that had the amenities they preferred, the most common responses received by both men and women were less than $39/month.

- When asked what the primary focus on the aquatic, sports and fitness facility should be men indicated that serving local needs and bringing tournaments to the area (35.2%) while women indicated serving local needs of all ages (38.4%)

- When asked the most important criteria for determining a site for a facility, both men and women agreed that the site be located to serve the greater Helena area.

- When asked how often households would use a facility if it had the facility components they most desired 54.8% of men indicated several times a week and 60.4% of women indicated several times a week.

- When asked how important it is to develop a new indoor aquatic, sports or fitness facility 53.4% of men and 63.5% of women indicated that it is a high priority.

Income under $50,000 v. Income $50,000-$99,000 v. Income over $100,000

- When asked if you or others in your household currently use INDOOR aquatic, sports or fitness facilities, 75.2% of households with income under $50,000, 81.9% of households with income $50,000-$99,0000 and 86.0% of households with income over $100,000 indicated that they DID use indoor facilities.

- The top three facilities that households with income under $50,000 DO use are; Carroll College, Fairgrounds and Private Health Clubs. The top three facilities that households with income $50,000-$99,000 DO use are; Other, Private Health Clubs and Churches. The top three facilities that households with income over $100,000 DO use are; School, YMCA and Churches.

- The number one reason that the various income levels do not use indoor facilities are as follows:
  - Income under $50,000 – Other
  - Income $50,000-$99,000 – Other
  - Income over $100,000 – Not something my household is interested in or has time for

- The top two reasons that groups use these aquatic, sports or fitness facilities are:
  - Income Under $50,000 – Proximity to Home & Work, Cost
  - Income $50,000-$99,000 – Cost, Proximity to Home & Work
  - Income over $100,000 – School Related Activities, Facility has Spaces and Equipment that I Desire.

- The most frequent statement that best represents how existing indoor aquatic, sports or fitness facilities that you are currently using meets your household's needs are:
  - Income Under $50,000 – Meets some of our needs (46.5%)
  - Income $50,000-$99,000 – Meets some of our needs (52.7%)
  - Income over $100,000 – Meets some of our needs (58.0%)

- The following components were identified as the top 3 most "strongly needed" by survey respondents:
  - Income Under $50,000 – Indoor Pool, Fieldhouse, Indoor Walking/Jogging Track
  - Income $50,000-$99,000 – Indoor Pool, Fieldhouse, Teen Activity Area
  - Income over $100,000 – Indoor Pool, Fieldhouse, Gymnasium

- When asked about various aquatic pursuits that could take place in an indoor pool the following were identified as the top three most "strongly needed."
    - Income Under $50,000 – Lap Swimming, Learn to Swim, Competitive Swimming
    - Income $50,000-$99,000 – Learn to Swim, Competitive Swim, Lap Swim
    - Income over $100,000 – Competitive Swim, Learn to Swim, Lap Swim

- When respondents were asked if they would support an increased tax to help build a facility that met their household needs the following responses were received:
    - Income Under $50,000 – 48.5% said they would need more information
    - Income $50,000-$99,000 – 55.7% said yes
    - Income over $100,000 – 69.2% said yes

- When respondents were asked about the establishment of a special taxing district for a facility of this nature 47.5% of households with income under $50,000, 65.7% of households with income $50,000-$99,000, and 76.0% of households with income over $100,000 would support the establishment of a special taxing district.

- When respondents were asked the maximum amount per month they were willing to pay for a facility that had the amenities they preferred, the most common responses received by all 3 levels of household income were, less than $39/month.

- When asked what the primary focus on the aquatic, sports and fitness facility should be:
    - Income under $50,000 – Serving local needs of all ages (39.6%).
    - Income $50,000-$99,000 – Serving local needs of all ages (41.3%).
    - Income over $100,000 – Serving local needs and bringing tournaments to the area (37.8%).

- When asked the most important criteria for determining a site for a facility all 3 levels of income agreed that the site be located to serve the greater Helena area.

- When asked how often households would use a facility if it had the facility components they most desired the following responses were received:
    - Income under $50,000 – Several Times per Week (61.4%)
    - Income $50,000-$99,000 – Several Times per Week (56.9%)
    - Income over $100,000 – Several Times per Week (58.3%)

- When asked how important it is to develop a new indoor aquatic, sports or fitness facility the following responses were received:
    - Income under $50,000 – High Priority (53.5%)
    - Income $50,000-$99,000 – High Priority (56.0%)
    - Income over $100,000 – High Priority (63.4%)

Seniors Aged 65+

- When asked if you or others in your household currently use INDOOR aquatic, sports or fitness facilities 75.5% of seniors DID use indoor facilities.
- The top three facilities that seniors DO use are; Private Health Club, Other and YMCA.
- The number one reason that seniors do not use indoor facilities are is because it is not something their household is interested in or has time for.
- The top two reasons that seniors use these aquatic, sports or fitness facilities are; facility has the spaces and equipment that I desire and facility has the programs and services that I desire.
- The statement that best represents how existing indoor aquatic, sports or fitness facilities that you are currently using meets senior's needs is; meets some of our needs (41.5%).
- The following components were identified as the top 3 most "strongly needed" by seniors; Indoor Pool, Teen Activity Area and Indoor Walk/Jog Track.
- When asked about various aquatic pursuits that could take place in an indoor pool the following were identified as the top three most "strongly needed" by seniors; Competitive Swimming, Lap Swimming and Learn to Swim.
- When respondents were asked if they would support an increased tax to help build a facility that met their household, 60.4% of seniors indicated they would support such an increase.
- When respondents were asked about the establishment of a special taxing district for a facility of this nature, 62.3% of seniors indicated they would support the establishment of a special taxing district.
- When respondents were asked the maximum amount per month they were willing to pay for a facility that had the amenities they preferred, the most common responses received by seniors was less than $39/month.
- When asked what the primary focus on the aquatic, sports and fitness facility should be, 43.4% of seniors indicated that serving local needs of all ages was most important.
- When asked the most important criteria for determining a site for a facility, seniors indicated that the site be located to serve the greater Helena area.

- When asked how often seniors would use a facility if it had the facility components they most desired 60.4% indicated they would use the facility several times per week.

- When asked how important it is to develop a new indoor aquatic, sports or fitness facility 43.4% of seniors indicated that it was a high priority.

Youth Under 16 in Household

- When asked if you or others in your household currently use INDOOR aquatic, sports or fitness facilities 86.1% of households with youth under 16 DID use indoor facilities.

- The top three facilities that households with youth under 16 use are; School, Churches and YMCA.

- The number one reason that households with youth under 16 do not use indoor facilities are is because of cost.

- The top two reasons that households with youth under 16 use these aquatic, sports or fitness facilities are; only facility available for my activity and school related activities.

- The statement that best represents how existing indoor aquatic, sports or fitness facilities that you are currently using meets households with youth under 16 needs is; meets some of our needs (60.6%).

- The following components were identified as the top 3 most "strongly needed" by households with youth under 16; Indoor Pool, Fieldhouse and Gymnasium.

- When asked about various aquatic pursuits that could take place in an indoor pool the following were identified as the top three most "strongly needed" by households with youth under 16; Learn to Swim, Competitive Swimming and Lap Swimming.

- When respondents were asked if they would support an increased tax to help build a facility that met their household 63.1% of households with youth under 16 indicated they would support such an increase.

- When respondents were asked about the establishment of a special taxing district for a facility of this nature 72.7% of households with youth under 16 indicated they would support the establishment of a special taxing district.

- When respondents were asked the maximum amount per month they were willing to pay for a facility that had the amenities they preferred, the most common responses received by households with youth under 16 was less than $39/month.

- When asked what the primary focus on the aquatic, sports and fitness facility should be, 32.0% of households with youth under 16 indicated that serving local needs of all ages was most important.

- When asked the most important criteria for determining a site for a facility, households with youth under 16 indicated that the site be located to serve the greater Helena area.

- When asked how often households with youth under 16 would use a facility if it had the facility components they most desired, 59.7% indicated they would use the facility several times per week.

- When asked how important it is to develop a new indoor aquatic, sports or fitness facility 63.3% of households with youth under 16 indicated that it was a high priority.

Helena v. Helena Valley v. East Helena v. Montana City

- When asked if you or others in your household currently use INDOOR aquatic, sports or fitness facilities 84.4% of Helena, 78.0% of Helena Valley, 89.2% of East Helena and 89.7% of Montana City indicated that they DID use indoor facilities.

- The top three facilities that Helena respondents DO use are; Carroll College, Private Health Clubs and School. The top three facilities that Helena Valley respondents DO use are; Fairgrounds, Carroll College and Churches. The top three facilities that East Helena respondents DO use are; Other, YMCA and Private Health Clubs. The top three facilities that Montana City respondents DO use are; Schools, Churches and YMCA.

- The number one reason that respondents do not use indoor facilities are as follows:
  - Helena – Existing facilities are too crowded or over booked and not available
  - Helena Valley – Not conveniently accessible
  - East Helena – Not something my household is interested in or has time for
  - Montana City – Not something my household is interested in or has time for

- The top two reasons that groups use these aquatic, sports or fitness facilities are:
  - Helena – Proximity to home or work, Facility has the programs and services that I desire
  - Helena Valley – Only facility available for my activity, School related activity
  - East Helena – Cost, School related activity
  - Montana City – Facility has the spaces and equipment that I desire, School related activity

- The most frequent statement that best represents how existing indoor aquatic, sports or fitness facilities that you are currently using meets your household's needs are:
  - Helena – Meets some of our needs (55.6%)
  - Helena Valley – Meets some of our needs (47.7%)
  - East Helena – Meets some of our needs (60.8%)
  - Montana City – Meets some of our needs (63.2%)

- The following components were identified as the top 3 most "strongly needed" by survey respondents:
  - Helena – Indoor Pool, Indoor Walk/Jog Track, Fieldhouse
  - Helena Valley – Indoor Pool, Fieldhouse, Gymnasium
  - East Helena – Indoor Pool, Teen Activity Area, Fieldhouse
  - Montana City – Indoor Pool, Fieldhouse, Gymnasium

- When asked about various aquatic pursuits that could take place in an indoor pool the following were identified as the top three most "strongly needed."
    - Helena – Competitive Swimming, Lap Swimming, Learn to Swim
    - Helena Valley – Learn to Swim, Competitive Swim, Lap Swimming
    - East Helena – Learn to Swim, Competitive Swimming, Lap Swimming
    - Montana City – Competitive Swimming, Learn to Swim, Lap Swimming

- When respondents were asked if they would support an increased tax to help build a facility that met their household needs the following responses were received:
    - Helena – 63.3% said yes
    - Helena Valley – 50.0% said yes
    - East Helena – 60.8% said yes
    - Montana City – 70.6% said yes

- When respondents were asked about the establishment of a special taxing district for a facility of this nature 70.3% of Helena respondents, 60.7% of Helena Valley respondents, 70.3% of East Helena, and 77.9% of Montana City respondents would support the establishment of a special taxing district.

- When respondents were asked the maximum amount per month they were willing to pay for a facility that had the amenities they preferred, the most common responses received by both all 4 geographic areas were less than $39/month.

- When asked what the primary focus on the aquatic, sports and fitness facility should be:
    - Helena – Serving local needs of all ages (38.0%)
    - Helena Valley – Serving local needs of all ages (39.3%)
    - East Helena – Serving local needs of all ages (36.5%)
    - Montana City – Serving local needs and bringing tournaments to the area (47.1%)

- When asked the most important criteria for determining a site for a facility all 4 geographic locations agreed that the site be located to serve the greater Helena area.

- When asked how often households would use a facility if it had the facility components they most desired the following responses were received:
    - Helena – Several Times per Week (57.8%)
    - Helena Valley – Several Times per Week (57.9%)
    - East Helena – Several Times per Week (58.1%)
    - Montana City – Several Times per Week (57.4%)

- When asked how important it is to develop a new indoor aquatic, sports or fitness facility the following responses were received:
    - Helena – High Priority (59.1%)
    - Helena Valley – High Priority (57.0%)
    - East Helena – High Priority (60.8%)
    - Montana City – High Priority (69.1%)

Section III – Phase I Summary

After completing Phase I of the Helena Multi-Sport Recreation Complex Feasibility Study, the following general summary can be made.

Market Analysis

Opportunities –

- The Secondary Service Area with just under 90,000 residents is large enough to support a significant indoor recreation facility. The population in both service areas is projected to continue to grow over the next five years.

- The Secondary Service Area has a reasonably high median household income level and there is expected to be growth in the youth age categories in the future. These factors will contribute to higher rates of participation in most recreation activities.

- There are no true public indoor pools in the market area and no indoor pool that is able to support competitive swimming.

- There is not a comprehensive indoor recreation center to serve residents needs in the market area.

- There is limited time available for the use of school gyms for community based sports organizations.

Market Constraints –

- The population base in the Primary Service Area is adequate in size with just under 67,000 residents but the facility will have to draw strongly from the Secondary Service Area to perform well financially.

- The demographic characteristics indicate an older population, fewer children and lower recreation expenditure levels. The population is also going to show the greatest growth in the senior age categories in the next five years. These factors have a negative impact on the use of indoor recreation facilities.

- There are a considerable number of private health clubs in the market area with the Capital City Health Club being the flagship of these facilities.

- Lewis & Clark County Fairgrounds has a significant Exhibit Hall and Entry Building that serves as a location for some indoor recreation activities and events.

- Specialty sports such as indoor tennis and ice sports are currently being provided for with existing facilities.

- Funding not only the development but the operation of a new recreation complex will have to be clearly defined.

Community Input

- The community is utilizing a variety of existing indoor aquatic, sports and fitness facilities. They are also reasonably satisfied with these facilities.

- Despite the presence of other facilities, there is a definite need for an indoor sports facility. The closure of the Carroll College pool eliminated the only true competitive pool in the area.

- Specific facility needs include:
    - Indoor pool to support competitive and lap swimming as well as learn to swim.
    - Gymnasium space
    - Fieldhouse

- The facility will need to serve the greater Helena area and a site that has strong regional appeal will be needed.

- The facility needs to serve local needs first and foremost as well as some area tournaments but does not need to attract large regional or national tournaments or meets.

- There is a willingness to pay fees for use but they must be affordable.

- The facility would be well used if the amenities noted are included and the fees are acceptable.

- There was strong, positive response for the potential of tax support as well as the possible development of a special district to support the facility.

- The project is a reasonably high priority.

- Other issues include:
  - Funding is a primary concern
  - The economic impact of the facility on the Helena area will need to be determined.
  - Determining who will own, operate and manage the facility will be important.
  - The future of the YMCA building will impact the project.
  - Potential equity partners in the project will need to be explored further.
  - The viability of covering Memorial Pool will need to be investigated.

Next Steps

It is clear from the first phase of the feasibility study that the market is present to support a possible Helena Multi-Sport Recreation Complex and there is a significant level of interest in the project from the greater Helena region. As a result, the Ballard*King & Associates project team recommends that the Helena Regional Sports Association authorize Phase 2 of the feasibility study that will focus on determining the exact amenities that should be included in the facility and their approximate size, the approximate capital cost of developing the complex, and the costs and revenues associated with operating the facility.

A complex of this nature will provide a sports facility that will serve the Helena region and also bring users to the area for programs and events. The complex will help to provide much needed sports amenities (competitive pool and gym space) and should complement the existing aquatic, sports and fitness facilities that are present in the area. The project would also provide a strong economic engine through not only the construction of the multi-million-dollar facility but also provide on-going employment opportunities for the area.

Section IV – Facility Program and Capital Cost Estimate

Phase II of the Helena Multi-Sport Recreation Complex Feasibility Study concentrates on identifying the key amenities that should be included in the complex, developing facility program options and determining possible capital cost estimates for the options.

Facility Program

Utilizing data from the Market Analysis and Community Input sections of the Phase I report, as well as from conversations with the Helena Regional Sports Association, three possible options for the Helena Multi-Sports Recreation Complex were developed. The primary goal in creating the program options was to present a range of recreation and aquatic elements that vary in function, size, and cost. The two key priorities for the complex were identified as an aquatics center to support competitive swimming as well as gymnasium space for basketball and other court sports.

Each of the proposed complex options will have three main program elements, the support spaces, recreation area, and the aquatics area. The necessary support spaces include facility administration, lobby and mechanical, locker spaces and an optional community/events room. The recreation wing proposes a gymnasium with optional fieldhouse. The aquatics wing offers a competitive/lap pool and an activity pool with slides, spray features, whirlpool, and lazy river.

Note: The program worksheet that was utilized to arrive at the three options on the following pages can be found in the appendix of this document.

Option # 1

Proposed multi-sport recreation complex Option #1 presents a base model that starts out at approximately 47,000 square feet and includes the necessary administration, lobby, and locker spaces, a collegiate gymnasium, an 8 lane by 25 yard competition/lap pool with seating, and a 2,500 square feet activity pool.

Helena Multi-Sport Recreation Complex

Helena, MT

Original Date: September 22, 2016
Revised/Printed: February 16, 2017
Midpoint Construction: February 1, 2019

Facility Program & Budget

BARKER RINKER SEACAT ARCHITECTURE

OPTION 1	
Average Cost/ SF	$ 355
Gross Area	46,955
Building Budget	$ 16,669,970
Total Gross Area	46,955

	Program Space	Net Total	Net Detail	Grossing Factor	Gross Area	Budget	Notes
1							
X	Facility Administration Spaces	1,968		115%	2,263	$ 551,000	
X	Lobby and Support Spaces	See Total		110%	4,356	$ 956,284	
X	Locker Spaces	See		115%	2,916	$ 1,073,686	
X	Gym 4a - (1) Collegiate or (2) High School	15,912		105%	16,708	$ 4,590,000	
X	Aquatics Support	740		115%	851	$ 221,000	
X	8-Lane x 25-Yard Pool	12,916		105%	13,562	$ 5,834,000	344 Bather Load
X	2,500 Recreation Activity Pool	6,000		105%	6,300	$ 3,444,000	250 Bather Load

Option # 2

Proposed multi-sport recreation complex Option #2 presents a "medium" model that starts out at about 76,000 square feet and includes the necessary administration, lobby, and locker spaces plus a community events room. This option also includes a gymnasium with (2) collegiate courts and a walk/jog track, 25 yard by 25 meter competition/lap pool with seating, and a 3,500 square feet activity pool.

Helena Multi-Sport Recreation Complex

Helena, MT

Original Date: September 22, 2016
Revised/Printed: February 16, 2017
Midpoint Construction: February 1, 2019

Facility Program & Budget

BARKER RINKER SEACAT ARCHITECTURE

	OPTION 2a
Average Cost/ SF	$ 338
Gross Area	76,044
Building Budget	$ 25,682,044
Total Gross Area	76,044

	Program Space	Net Total	Net Detail	Grossing Factor	PHASE 2	Budget	Notes
2							
X	Facility Administration Spaces	1,968		115%	2,263	$ 551,000	
X	Lobby and Support Spaces	See Total		110%	4,634	$ 1,046,881	
X	Locker Spaces	See		115%	3,765	$ 1,386,163	
X	160 Person Community / Events Room	2,000		115%	2,300	$ 653,000	
X	Gym 4 - (2) Collegiate or (4) High School	27,000		105%	28,350	$ 7,874,000	
X	12 Laps/Mile Elevated Walk Jog Track	5,500		105%	5,775	$ 924,000	
X	Aquatics Support	740		115%	851	$ 221,000	
X	25-Meter x 25-Yard Pool	18,568		105%	19,496	$ 8,244,000	523 Bather Load
X	3,500 Recreation Activity Pool	8,200		105%	8,610	$ 4,782,000	350 Bather Load

Option # 3

Proposed multi-sport recreation complex Option #3 presents a model at about 129,000 square feet and includes the necessary administration, lobby, and locker spaces plus a community events room. This program option proposes a gymnasium with (2) collegiate courts, a walk/jog track, and a fieldhouse with two 200 x 85 fields. The aquatics wing includes a 25 yard by 25 meter competition/lap pool with seating and a 3,500 square feet activity pool.

Helena Multi-Sport Recreation Complex

Helena, MT

Original Date: September 22, 2016
Revised/Printed: February 16, 2017
Midpoint Construction: February 1, 2019

BARKER RINKER SEACAT ARCHITECTURE

Facility Program & Budget

OPTION 3	
Average Cost/ SF	$ 300
Gross Area	128,889
Building Budget	$ 38,625,029
Total Gross Area	128,889

	Program Space	Net Total	Net Detail	Grossing Factor	Gross Area	Budget	Notes
3							
X	Facility Administration Spaces	1,968		115%	2,263	$ 551,000	
X	Lobby and Support Spaces	See Total		110%	4,872	$ 1,124,023	
X	Locker Spaces	See		115%	4,487	$ 1,652,006	
X	160 Person Community / Events Room	2,000		115%	2,300	$ 653,000	
X	Gym 4 - (2) Collegiate or (4) High School	27,000		105%	28,350	$ 7,874,000	
X	Soccer Field House	49,414		105%	51,885	$ 12,600,000	
X	12 Laps/Mile Elevated Walk Jog Track	5,500		105%	5,775	$ 924,000	
X	Aquatics Support	740		115%	851	$ 221,000	
X	25-Meter x 25-Yard Pool	18,568		105%	19,496	$ 8,244,000	523 Bather Load
X	3,500 Recreation Activity Pool	8,200		105%	8,610	$ 4,782,000	350 Bather Load

Construction Cost Estimate

The proposed order of magnitude costs are based on market analysis and historical data. Considerations were made for location, means construction data in Helena, MT, and conservative escalation projections for a midpoint of construction at February 1, 2019. This estimate includes facility costs only.

Option	Construction Cost Estimate
Option #1	$16,669,970
Option #2	$25,682,044
Option #3	$38,625,029

Project Costs: The cost estimate noted above does not include site and other soft costs. However, Ben Tintinger of Mosaic Architecture of Helena did estimate potential overall project costs. It is important to note that no site has been determined for the complex and a basic concept plan has not yet been developed. These factors could have a significant impact on total project costs.

Cost Summary	Option #1	Option #2	Option #3
Construction Costs	$16,669,970	$25,682,044	$38,625,029
Administrative Cost	$370,000	$607,500	$887,500
Site Development	$561,578	$819,956	$1,312,263
Development Costs	$1,568,319	$2,211,884	$3,027,261
Construction/Design Contingency	$880,077	$1,355,475	$2,041,240
Furnishings/Equip.	$595,000	$909,000	$1,003,000
Total Project Cost	**$20,644,944**	**$31,585,859**	**$46,896,292**

Section V – Operations Budget Estimate

The following operations budget estimate has been completed for the three complex options for the Helena Multi-Sport Recreation Complex. The following are the basic assumptions for the project.

- The three different complex options are.
    - *Option 1-47,000 SF* – A 25 yard 8 lane pool with seating and a meet room, a recreation activity pool (2,500 SF of water), and a gym with 1 collegiate basketball court. There will also be locker rooms, and an administration area plus other support spaces.
    - *Option 2a-76,000 SF* – A 25 yard by 25 meter pool with seating and a meet room, a recreation activity pool (3,500 SF of water), a gym with 2 collegiate basketball courts and an elevated walk/jog track. There will also be locker rooms, and an administration area plus other support spaces.
    - *Option 3-129,000 SF* – A 25 yard by 25 meter pool with seating and a meet room, a recreation activity pool (3,500 SF of water), a gym with 2 collegiate basketball courts, an elevated walk/jog track, and a fieldhouse (two 200 x 85 fields). There will also be locker rooms, and an administration area plus other support spaces.
- The first year of operation will be late 2019 or later. This budget represents the first full-year of operation.
- The presence of other providers in the market will remain the same.
- The center will be operated by a non-profit board.
- This operations estimate is based on a program plan for the facility only and without the benefit of a concept plan
- Sports teams utilizing the complex will pay for all time utilized.
- A reasonably aggressive approach to estimating use and revenues from pass sales, rentals and programs taking place at the facility has been used for this pro-forma.
- No concessions have been shown.

- This operations analysis will need to be updated once a final development option for the center has been determined and a final conceptual design has been completed.

- The operating hours of the center will be:

Hours of Operation: The projected hours of operation of the Helena Multi-Sport Recreation Complex are as follows:

Days	Hours
Monday - Friday	6:00am – 10:00pm
Saturday	8:00am – 6:00pm
Sunday	Noon – 6:00pm
Total Hours Per Week	96

Note: The hours of operation of the fieldhouse/gym (from November through March) could go later into the evening, seven days a week based on program use.

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.

Projected Fee Schedule: Revenue projections and attendance numbers were calculated from this fee model. This is the projected rate for 2019 (or later) based on the possible opening date for the center.

Category	Daily	3 Month Pass	12 Month Pass	EFT Monthly
Adult (18+)	$7.00	$125	$325	$30
Youth (6 mon.-17)	$5.00	$70	$175	$18
Senior (60+)	$5.50	$85	$225	$22
Family (2 adults/4 children)	N/A	$225	$600	$53

Note: Monthly EFT is not another form of admission but represents the cost of a 12 Month Pass broken down on a monthly basis (with a fee for monthly transactions) and withdrawn from the pass holder's bank/credit account on an automatic basis. This would be a month to month commitment only but cancellation and reactivation would require the pre-payment equal to two months.

Monthly and 12 month pass holders will receive a 15% discount on all programs and services being offered by the complex.

Operations Budget Summary:

Helena Multi-Sport Recreation Complex-Option 1 - 47,000 SF

Operational Budget Summary

Category		Facility
Expenses	$	1,506,899
Revenues	$	1,119,368
Difference		(387,531)
Recovery %		74%

Category		Year 1		Year 2		Year 3		Year 4		Year 5
Expenses	$	1,506,899	$	1,559,641	$	1,614,228	$	1,694,940	$	1,864,434
Revenues	$	1,119,368	$	1,231,305	$	1,354,436	$	1,422,158	$	1,493,265
Difference		(387,531)		(328,336)		(259,793)		(272,782)		(371,168)
Recovery %		74%		79%		84%		84%		80%

Helena Multi-Sport Recreation Complex-Option 2 - 76,000 SF

Operational Budget Summary

Category		Facility
Expenses	$	1,851,935
Revenues	$	1,408,748
Difference		(443,186)
Recovery %		76%

Category		Year 1		Year 2		Year 3		Year 4		Year 5
Expenses	$	1,851,935	$	1,916,752	$	1,983,839	$	2,083,030	$	2,291,334
Revenues	$	1,408,748	$	1,549,623	$	1,704,586	$	1,789,815	$	1,879,306
Difference		(443,186)		(367,129)		(279,253)		(293,216)		(412,028)
Recovery %		76%		81%		86%		86%		82%

Option 3 - 129,000 SF

Operational Budget Summary

Category		Facility
Expenses	$	2,177,043
Revenues	$	1,842,048
Difference		(334,995)
Recovery %		85%

Category		Year 1		Year 2		Year 3		Year 4		Year 5
Expenses	$	2,177,043	$	2,253,239	$	2,332,103	$	2,448,708	$	2,693,579
Revenues	$	1,842,048	$	2,026,253	$	2,228,878	$	2,340,322	$	2,457,338
Difference		(334,995)		(226,987)		(103,225)		(108,386)		(236,241)
Recovery %		85%		90%		96%		96%		91%

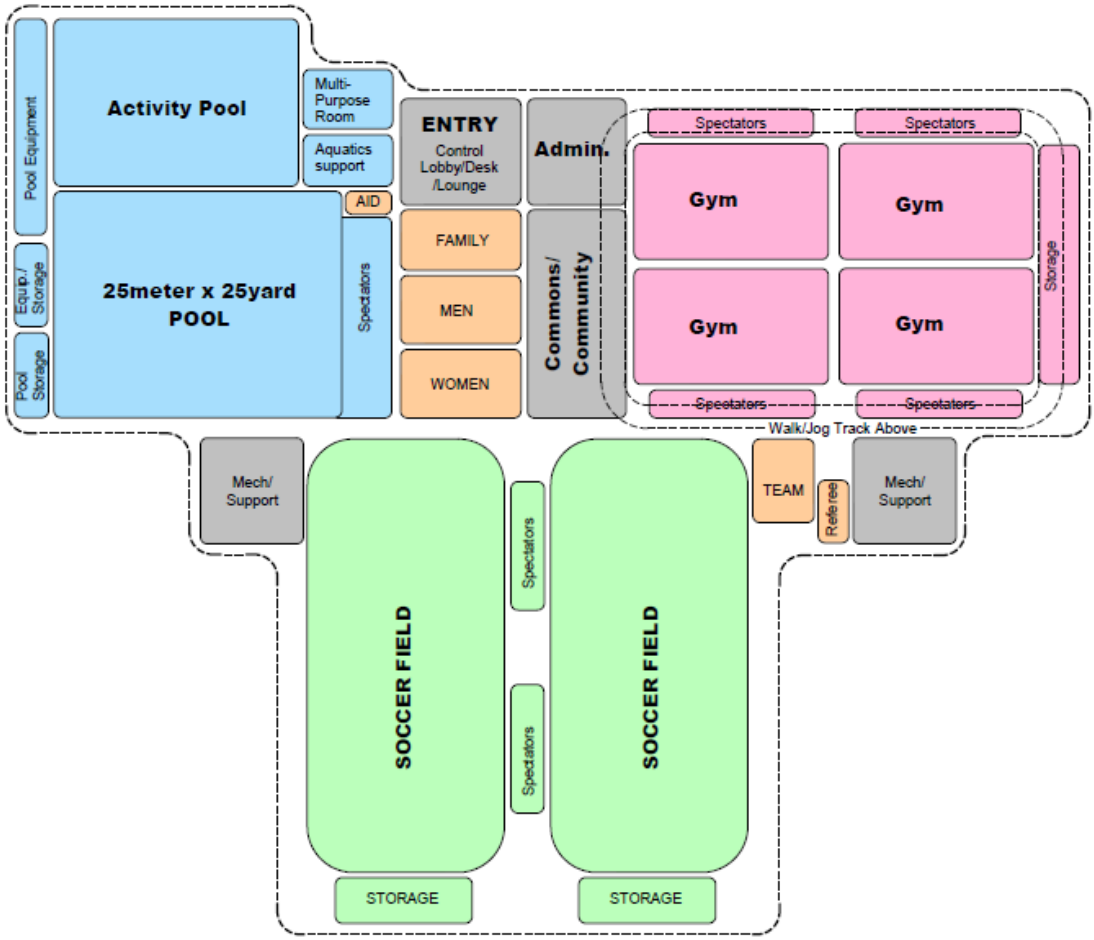
5 Year Projections: Revenue growth in the first three years is attributed to increased market penetration and in the remaining years to continued population growth, and program and service increases. In most recreation facilities, the first three years show tremendous growth from increasing the market 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 and services and by increasing user fees on a regular basis.

With proper management of expenses and a focus on growing revenues, the facility should be able to stabilize the annual operating loss in the $225,000 to $250,000 range moving forward from year 5 through 10.

Section VI - Concept Plan

HRSA, along with the community of Helena sports enthusiasts, worked alongside BRS Architects to refine the facility space program and develop a conceptual plan diagram for the Helena Multi-Sport Recreation Complex. The following plan diagram represents the preferred option as expressed by the community of Helena through an online survey. The purpose of creating a plan diagram is to understand the relationship and adjacencies of the programmed spaces and, in a general sense, define the footprint need for the facility. As HRSA moves forward through a site selection process and into concept design for the facility, this diagram will help in the evaluation of each site for land area, orientation, views, and access.

As shown, and described earlier in the operations analysis and space program, the plan includes: a **Natatorium** with family and competitive pools; a **Large Gymnasium** with four high school size courts; and a **Fieldhouse** with two indoor size soccer fields. Ancillary spaces, including locker rooms and restrooms, administration, community gathering and building support spaces are located to be shared by the three primary uses. While the diagram shown indicates the preferred option, it is also the largest and highest project cost. The space program will be continually evaluated and updated as potential sites are identified, project partners are secured, and funding options are explored.



HELENA REGIONAL SPORTS CENTER

OPTION 3 - PLAN DIAGRAM
129,000 SF

Section VII - Appendix

Appendix A – Survey Instrument

Appendix B – Survey "Other" Responses

Appendix C – Program Worksheet

Appendix D – Operations Budget Backup

Appendix E – Economic Impact Study

Appendix A – Survey Instrument

Helena Multi-Sport Recreation Complex Survey

The Helena Regional Sports Association is currently assessing the need for a new indoor Multi-Sport Recreation Complex, and your input is a valuable part of this process. This survey will take approximately 10 minutes to complete.

Please complete one survey per household

1. Do you or other sin your household currently use INDOOR aquatics, sports or fitness facilities?
    a. Yes
    b. No

2. Which of the following INDOOR aquatic, sports, or fitness facilities does your household currently use? Check all that apply.
    a. School facilities (other than for activities during school hours as a student)
    b. YMCA
    c. Carroll College (other than for activities during school hours as a student)
    d. Fairgrounds
    e. Private health clubs
    f. Churches
    g. Other ____
    h. Do not use indoor aquatic, sports or fitness facilities.

Only answer question 2 if you checked 1.h., Do not use indoor aquatic, sports or fitness facilities. Otherwise, move to question 3.

3. Why does your household <u>not</u> use indoor aquatic, sports or fitness facilities? Check all that apply.
    a. Not conveniently accessible.
    b. Costs too much.
    c. Not something my household is interested in or has time for.
    d. Existing facilities are not designed for the kinds of sports activities I am interested in.
    e. Existing facilities are too crowded or over booked and not available.
    f. Other: _____

4. What is the primary reason that your household uses these aquatic, sports or fitness facilities?
    a. Proximity to home or work.
    b. School related activities.
    c. Cost.
    d. Facility has the spaces and equipment that I desire.
    e. Facility has the programs and services that I desire.
    f. Only facility available for my activity.
    g. Do not use indoor aquatic, sports or fitness facilities.

5. Which statement best represents how existing indoor aquatic, sports or fitness facilities that you are currently using meets your household's needs?
    a. Meets all of our needs.
    b. Meets some of our needs.
    c. Meets very few of our needs.
    d. Do not use indoor aquatic, sports or fitness facilities.

6. Listed below are various specific INDOOR community aquatic, sports, or fitness features. For each one, please indicate whether you think more of each of these features is very strongly needed, somewhat needed or not needed by your family.

	Strongly Needed	Somewhat Needed	Not Needed	Don't Know
(A) Gymnasium for basketball, volleyball, etc.	1	2	3	4
(B) Indoor swimming pool/aquatic center	1	2	3	4
(C) Indoor walk/jog track	1	2	3	4
(D) Weight/cardio equipment area	1	2	3	4
(E) Group exercise/dance room	1	2	3	4
(F) Multipurpose rooms (space for a variety of classes)	1	2	3	4
(G) Fieldhouse for turf sports (soccer, lacrosse, etc.)	1	2	3	4
(H) Teen activity area	1	2	3	4
(I) Other: _____	1	2	3	4

7. Which THREE of the recreation features listed in the previous question does your household feel are MOST NEEDED at a new facility?

_____	_____	_____	
Most	2nd Most	3rd Most	None

8. A possible area of focus at a new aquatic, sports or fitness facility is one or two pools. Listed below are various aquatic related activities that could possibly have an emphasis at a new facility. For each one, please indicate whether you and your household think that aquatic activity in each of these areas is strongly needed, somewhat needed or not needed in the community.

	Strongly Needed	Somewhat Needed	Not Needed	Don't Know
(A) Competitive swimming	1	2	3	4
(B) Diving (1 meter)	1	2	3	4
(C) Lap swimming	1	2	3	4
(D) Learn to swim programs	1	2	3	4
(E) Recreational swimming (slides, play features, etc.)	1	2	3	4
(F) Spa/whirlpool/hot tub	1	2	3	4
(G) Scuba/kayak	1	2	3	4
(H) Water exercise	1	2	3	4
(I) Water polo	1	2	3	4
(J) Other: _____	1	2	3	4

9. Which THREE of the aquatic program areas listed in the previous question does your household feel are MOST NEEDED at a new facility?

_____	_____	_____	
Most Needed	2nd Most Needed	3rd Most Needed	None Needed

10. We are assessing need for an aquatic, sports or fitness facility. A facility of this nature usually requires some level of tax payer funding to build and operate. If a facility was built that met your needs as well as other currently unmet community needs, would your household be willing to increase property taxes to fund all or a portion of the project?
    a. Yes
    b. No
    c. Not sure, would need more information to make a decision.

11. One of the **possible** tax funding options could be the establishment of a special taxing district that would be larger than the city limits of Helena and could possibly include Lewis & Clark County as well as a portion of Jefferson and/or Broadwater Counties. Would your household support the establishment of a district for this project?
    a. Yes
    b. No
    c. Nor sure, would need more information to make a decision.

12. A portion of the operating cost for an aquatic, sports and fitness facility would need to be covered by user fees. From the list below, please indicate the maximum amount you would be willing to pay **per month** as an individual to use the facility if it had the features that you prefer.
    a. $50 or more per month
    b. $40-$49 per month
    c. $30-$40 per month
    d. Less than $30 per month
    e. Not willing to pay fees to use

13. As an example, if there was $100 to spend on a new aquatic, sports and fitness facility, how would you distribute the money among the categories listed below? Please be sure your total adds up to $100.

    $_____Indoor swimming pool

    $_____ Gymnasium

    $_____ Fitness space

    $_____ Indoor walk/jog track

    $_____ Fieldhouse with turf

    $_____ Multi-purpose room (for classes and meetings)

    $_____ Other _____

    $ 100 TOTAL

14. What should be the primary focus of the aquatic, sports and fitness facility?
    a. Serving local needs of youth.
    b. Serving local needs of all ages.
    c. Serving local needs and bringing tournaments to the area.
    d. Primarily focused on tournaments and events with accessibility for local needs when not scheduled for tournaments.
    e. Don't know or does not make any difference.

15. Determining a potential site for a facility of this nature is always a concern. What is the most important criteria for site determination?
    a. Site close to the downtown area of Helena.
    b. Site that is located to serve the greater Helena area (East Helena, Montana City, etc.). closer to the interstate for easy access by car for more regional users.
    c. Site with easy pedestrian and trail access.
    d. Site that is close to other public facilities such as schools, parks, or pools.
    e. Site that is available for low cost.
    f. Site that has shared parking with other facilities.

16. If a new indoor aquatic, sports or fitness facility were built in the Helena area with the features that your household desires, how often would your household use the facility?
    a. Several times a week
    b. Once a week
    c. Few times a month
    d. Once a month
    e. Less than once a month
    f. Never

17. In your opinion, how important is it to develop a new indoor aquatic, sports or fitness facility in the Helena area?
    a. A high priority
    b. A medium priority
    c. A low priority
    d. Not priority at all
    e. Do not have an opinion

18. Please indicate where you live.
    a. Helena
    b. East Helena
    c. Helena Valley (outside the city limits)
    d. Montana City
    e. Clancy
    f. Other _____

19. Please indicate the number of people in **your household** in the following age groups
    a. Under 5 ____
    b. 5-12 years
    c. 13-15 years
    d. 16-19 years
    e. 20-25 years
    f. 25-44 years
    g. 45-64 years
    h. 65+ years

20. Your gender
    - Male
    - Female

21. What is your total annual household income?
    - Under $25,000
    - $25,000 to $49,000
    - $50,000 to $74,999
    - $75,000 to $99,999
    - $100,000 to $249,999
    - $250,000 or more

Please provide input on additional questions, concerns or helpful information that we should consider in assessing community needs for a multi-sports complex. Thank you!
_____

Appendix B – Survey "Other" Responses

The following responses were received and have been provided as received, no edits have been made.

Which of the following INDOOR aquatic, sports, or fitness facilities does your household currently use? Check all that apply.

Other ____

- Soccer fields, Baseball Fields, Softball Fields
- 4h
- Health Club
- Ft harrison
- WinterBaseball Training
- Helena Ice Arena
- Last Chance Tennis Assn building near airport
- Helena ice arena
- Helena Ice arena
- Hockey rink
- Yoga Studios
- Helena Ice Rink
- Gymnastics facility
- Hotels
- Neighborhood center
- Last Chance Pool
- Last Chance Tennis Association
- Broadwater Hot Springs and Fitness
- indoor tennis club
- Ice Arena
- last chance tennis center
- CCHC
- Belgrade's indoor soccer facility
- Anywhere we can get gym time!
- Tennis Facility by airport
- Indoor tennis facility and gymnastics facility: HAC
- missoula indoor soccer
- Tennis center
- indoor facilities in great falls for soccer

- Hiking trails
- home
- Firetower Crossfit
- East Helena City Hall gym
- Hockey rink
- Roller skating warehouse
- Dance studios, gymnastics center and we have our own indoor fitness room at home
- CCHC
- Ice arena
- Roller rink
- Private
- Helena college
- Hockey
- Warehouse for roller derby
- Skate warehouse
- Climbing Center
- Softball fields
- Taekwondo Studio
- East Helena Outdoor Pool, Broadwater Pool
- 1035 Mill Rd
- Community center for dances
- basement of downtown building
- East Helena City Hall
- Hot springs in White Sulphur, Chico, etc
- none of the above
- Centennial Park Par Course and Trails
- We need a swimming pool if we're going to have a swim team! Swimming is a lifetime sport.
- use Carroll's pool when it was available
- Used to use the Carroll pool
- BDY (Yoga)
- Baseball facility in Great Falls
- East helena pool for lions swim practice
- Warehouse on mill toad
- Climbing gym
- local parks (ie: Lockey Park, Barney Park, etc.)
- Salvation Army
- Hockey
- Yoga studio

- Hockey rink
- Work
- home fitness (wind trainer)
- hot yoga
- Atlas Fitness
- hotel conference rooms to dance, cohesion dance ctr
- Capital City Health Club
- HAC
- Helena Athletic Club - Gymnastics
- Track and bleachers at vigilante, crossfit
- Hockey rink
- Capitol City Health Club
- broadwater athletic club, City Hall gym East Helena, Eastgate school East Helena Pool
- Roller derby and climbing gym
- Yoga studio
- High School Gym
- outdoor pool
- tennis center
- Broadwater, East Helena outdoor pool
- Seibel soccer fields, Lockey Park, dance studios
- private martial arts facility

Why does your household not use indoor aquatic, sports or fitness facilities? Check all that apply.

Other: _____

- we have our own equipment
- Enjoy outdoor activities
- I have a dog that needs lots of exercise, and I prefer to exercise outdoors.
- Montana has too much to offer to be stuck in a sweat room working off energy.
- Have own equipment in home
- no pool that is not busy anymore
- "over booed"
- use out door facilities
- new to area...typically "play" outside
- No
- No indoor soccer facilities in Helena

- We were not using our membership to Capital City Health Club enough to justify the cost per month. Part of the reason we didn't use it all that much was because the times most convenient for us were heavy traffic times.
- Not something my household currently needs at this time.
- Prefer to exercise outside.
- most of the sports we enjoy take place in the outdoors
- we like to be outside
- I just want to swim laps indoors and not pay for rest
- My son has sensory issues that make it difficult to go to a busy crowded pool. The pools we've tried don't have very good kiddie areas.
- the class schedules don't ever seem to line up with the reality of 2 working parent with busy kids
- More interested in outdoor activities.
- I am involved in other factors that take up time I would use at these facilities.
- new to the area
- To have a multiy sports complex would be a boon to the Helena area.
- better need for dedicated lap lanes and advertised times
- I will use it in the future and support any indoor aquatic facility.
- Affordable choices do not have childcare for my aged kids (too old) during convenient times; facilities with older childcare at convenient times too expensive
- There is so much to do OUTSIDE in Montana!
- Injuries
- No real good wheelchair accessible equipment

As an example, if there was $100 to spend on a new aquatic, sports and fitness facility, how would you distribute the money among the categories listed below? Please be sure your total adds up to $100.

$_____ Other _____

- none - this facility is ridiculous when we can't pass a bond for schools and your survey doesn't work correctly
- basketball courts are not listed, they are my primary need. Is that what gymnasium means?
- softball/baseball workout area
- arena
- handball/racquetball courts
- What about Hockey?
- Teen area 25

- Kid zone and water slides - 40%
- No money
- Tennis Court
- Tennis Court
- I am not convinced we "need" an aquatic facility. It would be nice to have, but I believe the costs and maintenance burdens are outwieghed by other pressing community needs - school repairs and jail facilities. As well, the survey forces a distribution of dollars, versus no distribution. Thus the answers provided do not reflect my position.
- underwater basket weaving ($70)
- 100 not sure
- This is a need that should be met by the private sector.
- On the funding side, local businesses should be consulted with as well. A quality sports complex opens the door for more and bigger tournaments which generates revenue for the local businesses.
- batting cages, tennis courts
- Softball 45
- Fieldhouse for turf sports $50
- Baseball hitting and pitching area
- I wouldn't spend $100 on this and your survey doesn't work properly. Someone should have proofed that you could select other!
- Indor softball training.
- Roller derby track
- Nothing $100
- We need an equestrian facility
- Roller Derby
- Not needed
- track & field area (with space for throws &jumps) $40
- Locker room and parking space - functional needs
- $50 inline/roller hockey rink
- concrete or sport court for roller derby track
- Kids active recreation in gyms such as climbing, ropes, etc.
- Inline skate track $40
- I would put $100 towards baseball/softball
- Baseball $50
- 75 to softball
- youth hang out/lounge/computers!
- Theater center
- I cannot tell if Multi-Purpose room includes fitness space as a purpose.
- 200m track

- 50 - hockey rink
- I am not in favor of a facility, and the fact I have to answer above question is ridiculous
- raquetball courts
- Not sure - depends on type
- Water slide/play area for kids
- Dance studio $35
- need a swimming pool for h.s., lions team and community
- Prime example is the field house in great falls, excellent use of space and fits the majority of needs for the community. Large competitive pool, with rec pool attached for swim lesson classes, and large gymnasium for all types of competitive events with bleacher seating all around for spectators.
- Ice rink
- Roller derby 50
- Volleyball courts
- Teen area 35
- Accidentally hit $5 for gymnasium. Will not let me delete.
- tennis courts - 10
- water walking pool
- Indoor play area for 0-12

Please provide input on additional questions, concerns or helpful information that we should consider in assessing community needs for a multi-sports complex. Thank you!

- There is a great need for a recreation complex. The tournaments we could host and the revenue they would bring into Helena.
- Since we already pay taxes for the schools in the district, residents should be able to use the facilities without paying the exorbitant hourly fees requested.
- High school volleyball and basketball teams - especially private and homeschool groups - have a hard time finding gyms for practice and games and often pay high fees to use school gyms. They would probably pay decent fees for practice/game time use of a dedicated gym.
- This facility is really not needed in a town the size of Helena. We can't pass a bond to update our schools and you think it's a good idea to propose increasing taxes or creating a tax zone for this?? REALLY? Also your survey should have included the choice of "none of the above" or "I do not want this facility" as an option.
- Indoor basketball courts and more tournaments would generate money in the Helena area. Missoula is busy almost every weekend in the winter with tournaments. The hotels,shopping, and restaurants benefit as well as the kids getting a chance to compete.

- We need facilities for youth to practice year around sports. Such as basketball and soccer.
- Helena needs a multi-sport complex!
- Suggested location near the Tennis Center & soccer fields. Close proximity to hotel that can accommodate bus parking & recent restaurant development. More central location for Hln residents. Shared use paths could be incorporated in site development & connect with current. Need something for older arthritic folks.
- The fitness clubs we have now do not have adequate parking
- Many other cities in Montana have multi use areas and Helena is desperately lacking one for kids sports and tournaments. Location of the facility is not so important as this is a relatively small city. Costs should be kept to a minimum, but if we do it as a community, we should do it right, and build a nice, and easily EXPANDABLE facility for future upgrades
- Helena has a desperate need for a quality pool facility. I grew up in Helena and swam competitively for 12 years we always struggled with getting pool time. Now with Carroll pool no longer available, our youth have no place to swim and that is a shame for a capital city.
- For my family the need for gym space is top of the list. Let's provide our kids with a place to be active and keep them busy.
- Based on what I see on Saturdays, soccer is really growing. A place to have indoor soccer games I think would be nice, Montana is behind in that regard.
- Clearly the local swim teams need a place to practice, as well as additional lap swimming places since the club pools are now being used by the team swimmers. We have the best soccer grounds in the state, however we have no indoor soccer practice arenas. This should be a primary emphasis. Serve local needs. Gyms, exercise rooms, weights etc. can be found at high schools and through gym memberships. The above listed lap swimming, indoor soccer cannot. Helena just finished working on parks and trails that serve walkers so I don't think the emphasis should be on this.
- Location should be easily accessed - for example, one of the land parcels between the Custer and Cedar interchanges near Costco.
- As a parent to athletic kids there is not an affordable facility available to us that provides gym space. Also there is not an acceptable facility to hold basketball, volleyball swimming etc. tournaments. Hosting tournaments would economically benefit Helena.
- It would be nice to have an area for baseball/softball indoor workouts-batting cages, etc.
- MUST be ADA compliant, or I will be unable to use.
- my annual household income is none of your business
- Partnering with YMCA or hospital might make sense. Any other big name sponsors like Gatorade?
- Would like to see a complex that is available to the public on a fee-based schedule, but is free or greatly reduced for school swimming and field activities (primarily non-traditional field activities like lacrosse, field hockey, and then more traditional like soccer and

football). I would prefer a swimming-based facility with lap swim for competition and a separate zero-entry, fun swim area for the kids - much like those in greater Denver area (thinking Golden, Wheat Ridge, and Littleton rec centers). A climbing gym option would be nice also.

- I believe that the Capital Hill Mall area would be a great place for an aquatic recreational area.
- It would be great if we could leverage some things we already have in Helena, e.g., if the YMCA could be contracted to manage it.
- I think it very important that we have space for teens 13-18 to have a place to have activities
- turf field is very important to help our youth develop in the winter months for sports that are played on fields
- Hours of operation so everyone can use it.
- Youth baseball and soccer need indoor training facilities similar to those in Missoula, Billings, and other Montana cities
- Ice rink would be nice - even if just outdoor in winter but year round inside would be best.
- Not just all indoor but outdoor activities outside the facility. If your going to have a sport facility hit most sports. Tennis, sand volleyball, basketball courts these you can have outside as well. Within a track maybe? New ice rink? I doubt it but that would be cool.
- I think it would be great to serve the local community and bring an economic benefit to the area through hosting tournaments, etc. The focus should be local with the possibility to share regionally and benefit the local economy.
- Consider this facility as a way to improve the mental and physical health of the area residents.
- Facility would work well out by the airport, close to the soccer fields and tennis clubs.
- By the time this facility is going to be built, my kids will no longer be kids. However, I would still be willing to support it!
- We were in Coeur d'Alene recently for a tournament. Their school facilities are amazing. Come on, Helena, we need to do this!
- Would love batting cages
- A family friendly facility investment like this should be used to renew and/or support areas of town that need attention. Ideal brown field or Centennial Park investment. Maybe a good TIF investment if it's used to spur additional investment in an area.
- Convert the existing Y.....upgrade it and tear down the building next to it and use this space.
- Having a community rec center with a fieldhouse/gym would be amazing!
- should have asked questions about separating the sports facility from aquatics. I support an aquatics solution, but not the indoor turf-type. Should be funded by those users.

- As a user of the YMCA, I recognize the facility there struggles to meet the demands on its usage. In particular, it becomes difficult to balance demands on the pool and gymnasium to meet the needs of youth sports and general users. It's also important to note that affordability for these user groups is crucial to the success of a recreational facility.
- You should consider the lot that the Capital Hill Mall is. The mall is no longer very popular and there are few stores left. A multi-sport complex would create a better environment since it would be new and clean, where the mall is dirty and run down.
- I believe it would be a great benefit for our youth and families. The younger generation, along with all those that are active and wanting to get active, need a place to go. I think it would give kids a chance to feel like they have a place to go and be active and fit in because not all kids feel they can or are able to compete in school because of the peer pressure. And it would keep them from going towards more negative environment/association. Plus some have home lives that are not always so pleasant and it would be a great place for them to work on positive skills. Maybe in the future of having a center like this we could bring in coaches and mentors to encourage and give hope to those young or old.
- We cannot continue to raise and be required to pay more taxes in this county. Start building things in Jefferson County, i.e. high school, etc.
- I think a wonderful spot would be the Capital Hill (or city) mall. The one over on Prospect, if at all possible.
- Thank you for considering this facility. Pleas ensure it is ADA Compliant so the entire community is included and integrated.
- Is there any way that the YMCA canbe part of this decision. They provide so much for the community: it'd be nice to include them or to upgrade their facilities for this purpose.
- Such facilities require constant, and consistent maintenance. To be successful, they also require consistent chargeable use. While it would be nice to have such a facility, we do not have enough tournaments in the state or local area to make it a financially viable proposal in my opinion. I am not yet convinced of the need for a full time facility.
- Its a good idea, but in the current environment of so many community needs it will be a tough challenge. But one that is worth considering. Hopefully it can be located in a section of town that doesn't stir up the downtown versus the valley group as there is too much of that in this town anymore which is causing stalemates and no action for the good of the greater community. Other communities are moving ahead while Helena fights among one another about what neighborhood is best to develop.
- I think a multi-sport complex that could house tournaments would be a nice boost to the Helena economy and make us more of a regional destination.
- I believe the "mall" area could be transformed into a facility that could meet our needs.
- No input at this time
- I think this survey is flawed, almost like a push poll.

- Try fixing the area roads first. I think basic infrastructure needs should be a higher priority than a multi-sport complex of any kind if you are asking for taxpayers' funding.
- We have other projects that should be addressed (i.e. Jails and Schools) prior to building a redundant multi-sport complex.
- Indoor turf would be very helpful to a large group of users especially in the winter. I believe other communities are developing their football, soccer and Lacrosse teams at a quicker rate than Helena because of their indoor facilities.
- This would be a great addition to Helena and surrounding communities. The special tax district seems like a reasonable and practical way to distribute the cost burden among the communities it would serve. If the project is a go, then I'd like to see a site selected that is close to the interstate or Hwy 12 that is infill development rather than converting previously undeveloped land.
- Softball fields for tournament use!!
- This is lovely but ridiculous in light of the fact that our school facilities are falling apart.
- Buy the old mall and make it into indoor pools and indoor soccer/tiurf fields. Easy access to highway; it's already a blighted building; some infrastructure already there.
- Indoor soccer would be awesome. As well as a new pool for competitive swimming. An indoor water park to use during the winter would be a bonus.
- My answer to question 20 is not accurate, because I do not believe that question belongs in your survey.
- Would love to see a swimming pool with dedicated lap swim and options for swimming lessons.
- If a complex is built, don't forget parking for RVs.
- We need a place to have all of the traveling sports have room. it snows in Montana and the only place anyone can get gym time is at the schools but that is not enough room or convenient - Helena needs to grow up and get some facilities that small towns have. It's crazy there are no places in Helena for youth sports.
- A complex near the Helena trail system would be fantastic, however, I think it's important to keep costs low so that it's affordable.
- I think the biggest need is for sporting events, tourneys, and competitive swimming.
- An indoor facility will enable sports minded youth the ability to maintain levels of varying fitness that are crucial to the development of each individual's goals in athletics. These goals usually keep a focus in life that have benefits outside of sports. Thank you for your efforts!
- I fully support this idea. I have children in softball and in soccer and each year it is extremely difficult to find a facility to practice in.
- This is highly needed!
- youth sports should be the number one priority adult leagues should only get times after 8:30 pm

- There is plenty of gym space and workout facilities for traditional indoor sports during winter months. The primary purpose of an indoor recreational facility should be to provide year-round options for sports that are currently limited to summer months only. Examples would be soccer, swimming, maybe rock climbing.
- It would be good for community businesses to have the ability to hold more/larger tournaments. It would be good for the community to have adequate gym space for all sports groups to use in Helena.
- there are a number of existing facilities that could be renovated to meet new needs - We miss the 7th Avenue Gym!
- We desperately need an indoor soccer and swimming complex. This could be used for the public in Helena as well as hosting tournaments and competitions with outside locations to bring in income to the city.
- Helena Youth Soccer Association does not have an indoor complex. Therefor, the teams are forced to scour Helena to find a school gym or community center for practices in the winter. An indoor facility would be great!!!
- Space for roller derby track should be considered.
- We need an indoor soccer facility for adults and general gym space for adult activities.
- This would be so awesome! Thank you for working on this. :)
- Our community is in dire need of a competitive swimming pool. Ideally, it should be configured to support both short and long course competitive swimming events. This should be made available to support high school and age group swimming. If this community would support a large complex for indoor field events and multiple courts (volleyball, basketball), even better. We have an opportunity to draw large events here in Helena, which is ideal, since we are centrally located in the state. Make sure to plan for adequate spectator viewing. The Butte YMCA is a great facility, but it didn't plan for additional room for stands. Sports is a great way to enrich our youth, and if we can provide a field house which supports swimming and diving, lacrosse, water polo, volleyball, etc., we increase our youyh's opportunity to compete at the collegiate level. It's a Must have, and let the surrounding communities pull together to support this!!! Thank you!
- The cost of a pool is way too high for the community to absorb and the use would be limited. A field house with a hard surface makes more sense and can operate with little to no taxpayer support.
- Teens needs should be considered a high priority.
- This is not a worthwhile endeavor in my opinion. Helena does not need something like this nor will the community tolerate yet another ask for tax dollars. Helena needs to tend to its existing infrastructure needs such as schools and roads before anything like this should be considered.
- Indoor for spring indoor baseball space. Basketball and volleyball seem to always be fighting for gym space there is not enough

- Should also consider seating for a large indoor arena that accommodates 5000.
- Helena needs more for our youth to do
- It's crazy to me that a city of helena's size and income level doesn't have a year round indoor swimming pool that isn't private or tiny (the y). When we lived in Missoula we had a family membership at currents and went multiple times a week. Helena needs an indoor aquatic facility with decent lap swim lanes, indoor play features, lots of space for classes, a hot tub/spa. Like currents but bigger!
- The swim team needs this quickly. Gym space is hard to come by and the numerous youth basket and volleyball teams in Helena really need this facility as well. As it is now if you don't have a school district employee involved in your team gym time is impossible.
- How about where the mall is?
- More information should be made available and a few different proposals on building size,shape and costs that would be easier to make the support decision better.
- I would love to see a place for indoor roller skating. Lap and speed skating
- Access to facilities must be fair. So many times in Helena gaining access to or use of available resources depends on who you are or who you know.
- Fix central school before building this project
- I am the head varsity lacrosse coach for the Helena Lacrosse Club and I am very familiar with the needs for the over 200 kids in our club for indoor space. We continually struggle to keep kids active during the winter months and we are very excited about the possiblities this complex will offer. Should you need any advise about the needs of our lacrosse club please don't hesitate to call. (406) 533-5348
- I want to support your idea, but I have serious concerns about your ability to fund the maintenance of your facility. If you're going to sell it for use, then it has to be well maintained. I'm not sure Helena would financially support the pool space. They want it but won't believe how much it costs to maintain clean water 24/7/365.
- As a member of Hel'z Belles, I'd love to have a facility large enough where we could practice and hold bouts.
- Roller derby is gaining more interest & support. I would love to see this space being able to accommodate this sport. Also if you're a home owner paying taxes for the facility I think daily use should be free with renters having a monthly charge.
- Cannot stress enough, how much we need an indoor facility such as this.
- Track and field should be considered when this facility is built. With a track for runners, jumping runways, and areas for throwers. Both high school and college athletes would be using this facility and the high school teams could use this facility during their off seasons.
- I'm very appreciate you are beginning to look into this. We are way overdue of hosting tournaments and having a good center for our town to use for our sports

- This is a must for Helena, we have nothing available for swimmers during the winter months except for the high price health clubs.....it's time Helena steps up and does something for the average income family
- Supporting facilities and activities that provide community services and are community oriented is very important. In addition, Helena has several residents that compete in regional swim meets, for example, and other similar activities. However, we have to go to other towns like Bozeman to participate in such activities or to be able to practice in competition level facilities. I think a new facility would be of high value to the local community, for this reason and because the demand is high for such a facility, as evidenced by not even being able to park in the parking lot of the private gym I attend at certain times of day, or being able to use the equipment I want to. Athletics and the recreational/active community is a positive community to support. These folks add benefit to Helena, and bringing in these types of visitors is also a plus for Helena. These are the types of people that do positive things and create a positive environment - we want to encourage that. They will also bring good business and help encourage an increase in the vibrancy of Helena and its businesses (encourage good food and restaurants, etc).
- Helena needs an indoor pool, that is open for lessons and recreational swimming.
- It would be helpful if this could be built close to the proposed mall area by the airport.
- Something near the capitol complex would be ideal.
- This questionnaire was too focused on aquatics and did ask detailed questions about the other sports. You will be more likely to receive stronger, broader support if you are not so singularly focused. I understand there is a great need for a pool in Helena; however, there is also great need for indoor field house, more gym space, venue for music/dance, etc. That said, that you so much for pulling this together. Long overdue in our community. Thanks!
- I think the current capital hill mall would be the perfect location for a new facility. It is centrally located and has a ton of parking for events.
- I think Helena is ready for a sports complex. Our schools need swim facilities, our teens need a place to go that is safe and offers adventure and learning. We also have a local scuba following that would greatly benefit from a pool for public lessons and as a regular on site adventure for kids and adults.
- The pool will get used. The entire facility will pay for itself I believe
- Our middle aged and senior population is in great need of an affordable indoor aquatic facility to use for fitness and socialization. These individuals are often on fixed or limited incomes, need weight management, and suffer varying degrees of arthritis. As a healthcare provider who often interacts with this population, I find access to this type of facility to be quite limiting to patient progress/ outcome.
- We need a pool hat divers can do skills and get certified in. One that we can use when needed

- Need to be able to use the fields indoors for a variety of sports including rugby.
- When looking at aquatic facilities, I would highly recommend looking at the West Boise YMCA in Boise Idaho. It has diving, lap swimming area (that could be used for meets), water slide, baby/toddler pool, rec pool that is not as deep and warmer for lessons. It is awesome! I miss being walking distance from this facility. They also had rock climbing wall, fitness areas, and gyms within the facility.
- Swimming is a life long sport. Both my children competed and one is going to college on swimming scholarship. It's very important that our community support this.
- Important for the whole community for all ages. Important to draw others for tournaments and conventions, etc.
- Not sure.
- I am pretty unwilling to raise property tax and then have to pay any substantial user fees.
- Pie-in-the-sky location would be land with enough room for a future multi-use (bike/run) trail layout for greater potential use options.
- I believe the first priority should be a large regulation, ideally olympic sized pool or pools. I would like to see a part of the pool with water slides and other fun stuff for kids. It would also be nice if the pool had an outdoor component, or at least part of the building could be opened up in the summer. I am not a big fan of soccer and indoor field sports, but I know other people are. In that regard, it would be nice if the facility were built on a space with enough room for an aquatic center AND a field house, but given limited funding, I think the first priority is the aquatic center. If gym and community space is needed, consider cleaning up the old Armory building next to the YMCA and using it!!! That would not cost much. I don't think that all the potential activities in this survey need to be at one location.
- Facility needs to be self sufficient. Build for 1st success with one focus but plan for expansion to 2nd & subsequent priorities. Don't try to initially build mega facility for all wants. This will create a multi-million dollar facility and won't get the public support.
- Unfortunately, this is too late coming for my family and the kids will be going to college soon, but we desperately needed access to gyms when they were growing up.
- I think it would be great to have a facility where we could use it as a community but also be able to hold high school tournaments there. Considering we have two AA schools (who are usually very competitive) and we are the state's capitol, it would be nice to have a facility to hold tournaments.
- This facility would a huge asset to Helena! Why wouldn't we want this in our community?
- We moved from a city with amazing indoor baseball facilities and we were very disappointed in Helenas low quality indoor facility's especially during the winter months. My son wants to play college baseball and there is ZERO places to practice in the winter so most likely if we continue to live in Helena he has very poor chance of making his dream a reality

- Fairgrounds, K-mart building or mall site. If it is a multi-sport site make it have decent seating, not like the place in Great Falls. Butte Civic Center has great seating. Would be a benefit for the community. Good foresight like the Fairgrounds improvement project has been.
- I think a facility that is reasonably priced for families is greatly needed. We frequently use both the YMCA for sports and capital city health club flour swimming. It would be nice to have a facility that combines the affordability of the YMCA with the great facilities of CCHC.
- Swimming
- We need something.
- We would like to see several "rooms" specifically for team practices for outdoor sports in the winter months. (Soccer, softball, baseball, etc.) An indoor regulation track would be amazing. Also-- it needs to have enough seating in the gymnasium area to hold a State championship or concert-- this is a must. No point in spending this kind of money for something that won't function like this!
- Good luck. I voted yes on school & jail bonds, and would vote yes on this, but am obviously in the minority.
- We really need an area where softball/baseball can practice year around
- hosting state and regional youth tournaments is needed in Helena.
- It would be great if Helena had the facilities to host sports tournaments; swim meets, basketball, etc. Location is important but since Helena is so spread out it would be hard to find a location to please most; a reasonably priced or DONATED piece of property would help. I don't want to see places like the YMCA lose business so maybe the project could be coordinated with existing facilities. Like a roving membership sort of thing: sharing facilities for the same cost? Like using the hot pools at the Bwater and then using the gym at the new facility all under one umbrella membership? This so that all the amenities in Helena won't just keep getting reproduced and this might help to focus on one big gymnasium and people could still swim at other facilities..... Look at what other communities are doing. Get construction businesses, etc to donate equipment, materials, labor to help offset the costs AND maybe one of the big developers in town to donate the property needed to build a facility.....thanks for listening.
- We need this! Thank you for all your work!
- how will operations and maintenance be funded?
- What about a skateboarding half pipe??
- Please consider the location carefully. Why not built by the Airport? This location is easily accessible to youth on both sides of town, as well as by highway for our neighbors to the East, and does not exclude the West side of town. If tournaments, meets, etc. are brought into the complex, this location would provide quick access to motels, restaurants and shopping for visitors. As often is the case in our community I saw only East side options listed with no option for a West side site. The imbalance/bias in our town is

staggering and alienates many West side community members who pay taxes, and who would gladly help fund a project like this if the project consciously provided equitable access to all youth in our community. This type of grass roots project would be a great way to foster community-wide support for our youth. Also, please carefully consider the monthly fee to join. Opportunities for our community's youth are already greatly determined by youth who "have" and those who "have not". This type of project should have a primary mission of leveling the playing field for our community's youth, not broadening the gap. Thank you

- Gym much needed
- Awesome project! Please do it!
- Facilities open up out city to attract many events. Events pour dollars into our community to all our businesses!
- You would have a better chance of getting this through if you would build an Arena that can hold State Tourneys. Good Luck
- The dearth of good recreational facilities was a real concern for us when we were deciding whether to move to Helena a few years ago. I'd be thrilled to see a new facility, provided the monthly fees for usage are not prohibitively high for most residents. The fact that Last Chance Splash can only operate for 2 months out of the year really highlights the need for indoor water recreation and swim lessons in Helena. The YMCA and other private facilities are inadequate to serve the community. Let's get this done!!!!
- I'm so glad to see this effort taking shape!
- We need a community place where Grandparents, Great-Grandparents, Parents, and children, especially young kids can all have fun together. Athletic clubs basically offer only the option of separate activities for different ages. Older adults taking care of kids have a hard time finding an indoor cold & hot weather place for the adults and the young kids to be active and socialize with other caretakers and kids. Seating for the adults to rest while the kids run around and/or do activities is also needed. Right now the walking space at the indoor mall is the only place to go, and even that may be closed now. The combined cost of housing and daycare is unaffordable for many families, thus Grandparents taking care of little ones is now incredibly common. Please create activity space for Seniors and Kids to be together!
- A pool that can be used for competitive swimming is absolutely vital!
- Our primary focus is hockey and lacrosse. Would love to see a training room for these sports with access for kids to develop in those sports, available for team use.
- I would like to see an indoor track facility that local teams and individuals could use for training. It could also bring athletes in from western Montana for track and field meets and game festivals.
- Go HRSA!!!
- Our community needs are greatest during the winter months and lowest during summer, so this should be a huge factor in a community events center.

- The Caird property and the Capital Hill Mall property would be thoughts for a facility with a pool and other needed sports access. A swimming pool is desperately needed here in Helena.
- Thank you for working on this!
- I'm concerned to what effect this new facility would have on the YMCA if it were to also include a gymnasium, after school programs etc. I think what we really only need is a good aquatic center.
- Buy Northwestern Energy property and build it there
- A competitive pool could bring many opportunities for state meets and revenue.
- Location and cost is an important factor if we use the facility. It needs to be close to our other activities and also a reasonable cost. There are lots of health clubs and services in Helena. I would like to still use my heath club and use this facility as a second one. If it is too expensive or out of the way, I won't use it.
- I feel this very much needed in our community. This could bring in events from the whole western region of multi state.
- How long would it take to build?
- Helena does not need another water park it needs someplace that can be used as a sports complex similar to the one in Polson http://www.mvaquatics.org/facility/building-and-design/facility-layout/
- It is a good idea, but given the needs of the schools and the detention center, I doubt the voting taxpayers would support it.
- While my household does not use a pool at this time, we have grandchildren and friends who would use this facility on a regular basis and we support them. Our own children learned to swim at the Carroll College pool and its loss to the community has had a negative result for several areas of swimming.
- This is a wonderful idea that would help draw in more family-oriented activities.
- there are no indoor pools that qualify for USA swimming meets. this should be the priority.
- Would prefer to see a focus on aquatic facilities, specifically lap swimming and competitive swimming - most other aspects are reasonably available through schools and existing fitness centers.
- This would be wonderful however the need for an additional high school has been needed for years and Helena residents are not willing to raise taxes for that and we are struggling to keep our elementary schools open. This is a wonderful idea but with out a shopping center/mall Helena has not ben a popular place for tournaments, there is no place for visitors to go between games. This is a nice idea however with Helenas real estate being one of the highest in the country I can't see residents willingness to add more to their taxes. I also feel such a complex should be available to all income levels and a monthly fee would turn away families with pre and teens that could use this the most!

- I think there are plenty of gyms/fitness centers in town but Helena is seriously lacking in a facility that has pools that are not cram packed and are not capable of sufficiently providing services for the various swim teams we have or allowing for any kind of growth in a swimming program. THAT is the serious need . . . not more fitness class space or space for weight machines, etc. If a complex was accessible and affordable for the community as a whole as opposed to just another "club" . . . meaning it worked more like a municipal pool than a money making operation only the well-off could afford it would be a huge benefit for Helena as a whole.
- Racquetball would be great to have
- Need an indoor swimming pool. Not knowing all the facts, seems like Carroll jumped the gun a bit and politically just wanted that pool gone to open up that space for their own agenda...I guess thats fine, but now Helena has no indoor pool facility and thats embarassing.
- the question about site location wasn't helpful for me. the reality is that I would use a facility that has easy access by car (I live in the north valley so assuming I will always be driving), ample parking, a drop off/pick up lane for my kids, easily accessed by main roads and pie in the sky would be public transportation for my 7/8/9th grader who isnt driving yet.
- I spend $115 a month for a family membership and my youngest is unable to use the fitness equipment until he is 13. This is very frustrating because the only things he can do at the gym is swim (which I have to be with him) or be in the basketball court (which he does not enjoy). Especially in the winter months it would be nice to have a facility that is more family friendly.
- We really need an indoor pool in our community. the other space is important as well, but the indoor pool is lacking.
- Pool water should at least be partially heated with solar heating. Pool should be sanitized with ozone and ultra voiles light to reduce chlorine.
- Hockey is growing in Helena but has outgrown its facility for youth programs, private rink is prohibitive for all youth to afford to try and or play the game.
- swimming for all-low cost
- We should build a pool that is wide enough for eight Lane short course and long enough for eight Lane long course. This pool should be deep enough to dive at both ends about 6 feet in depth The city municipal pool has eight lanes for a short course but it is not deep enough to ever use this was a really dumb idea. We need something with adequate parking and that we could use all your long and then Halina could generate more money with tournaments.
- The Montana Environmental Trust Group has lots of land for sale cheap in East Helena. check it out
- I think providing space for alternative sports would help round put the facility. Also making it possible for new sports to develop.

- A great location would be the corner of Euclid and Last Chance. Merging with the YMCA???
- We need this!!
- Carroll College needs to make a LARGE investment in this facility. Carroll created a real issue in our community and failed to consider bringing in the community to possibly come up with ideas for the existing pool. Helena's aquatic's offering are pathetic in comparison with the rest of the state. We have a huge opportunity to create a long term revenue stream if done right. Would like to see this project turn into something that rec'd wide spread support as it could cover multi-generational learning and improvement. Yes Please to a Pool!!
- Teen area needed, basketball, pool tables, rock wall, fitness area, handball courts, indoor track, general sitting lobby.
- Total annual household income should have an option for Prefer to Not Answer. This is personal and should not be required and that is why I put under $25,000.
- Thank you
- I think the perfect site would be off the South Helena interchange between I-15 and Highway 12 (behind new Blue Cross Blue Shield building) with access to both I-15 and HWY 12.
- I believe this is a great opportunity for Helena to bring in Tournaments every weekend to help the economy, as Helena is centrally located between 4 major Montana cities. This is also a great opportunity to improve facilities and help improve practice opportunities for our young athletes, as gym space and pool space is greatly needed.
- Most of my answers are geared toward a facility for swimmers because we have a member of the school swim team in our household and have seen how sparse the facilities are in Helena. I am a member of a local gym and love it, so I would not be moving to a different location, but our swimmer would spend a significant amount of time at a new swim facility.
- Biggest consideration for me is how to complement other facilities and not put other facilities out of business. So a reasonable use fee may need to be considered.
- make it private/cooperative, not governmental
- location: Close to Helena, near schools, walkable & bikeable
- If I could pick a site that best fit it would be location of the YMCA. This site is close to the majority of residents, not far from the I-15 exit on Cedar, and accessible via bicycle or on foot. It could also lead to a partnership and joint funding between the city, county, YMCA and Carroll College if the facilities can be designed to accommodate their users.
- The facility should provide sports programs for teens. Sports are great, but a more social based teen center is also needed to help keep kids out of trouble who aren't necessarily into sports. This facility could be a great venue for a less physical-activity-based hangout place that is FREE of cost for teens (which is virtually non-existent, and a real problem in Helena and other rural areas) as well. We could really influence some positive social

change by incorporating programs like this. Adult programs should also be offered. ex. adult swimming classes, soccer teams, and other recreational sports teams for adults.

- Should hold enough people to have tournaments and concerts..say 6500. We have emough health clubs.
- An indoor swimming pool is needed for swim meets. I know that Helena does not have competitive swim meets because there is not a 7 lane pool available.
- Helena has already started filling the demand for some of these offerings through their private gyms and fitness centers. We are currently saturated with gyms! In order for this to be successful it should probably focus on the things Helena doesn't have, like the indoor turf/track/pool, etc.
- I own the Scuba shop here and getting pool time to teach students is incredibly hard, We can only teach during recreational swim, but then the facility closes at 8 only giving us an hour, or we can only go on certain days because the pool gets really cloudy and they don't want us in there, so to have a facility that we can use anytime (with the exception of tournaments) as there are other facilities to do lap swim, etc. And if we could may just a monthly fee instead of per person
- The students interested in competitive swimming are at, and have been at, a huge disadvantage in the Helena area. Students do not have a proper swimming facility to practice and compete for their own desire, possible scholarship opportunities, and possible revenue to Helena through tournaments and events.
- There was a "Rec Center" in WY that i went to as a child. You bought a pass for only what you used. Passes were made available at a lower rate to lower income children, as part of a summer activity program. This provided us with great recreation that we otherwise would not have been able to afford.
- While support a public facility, less likely to use it due to convenience of current private facility to workplace and established relationship with personal and group trainers.
- Hi. I am a member of the Helena Citizen's Council representing District 1. I know we would be very interested in hearing about this project. We meet on the fourth Wednesday of each month. You can contact me if you would like to be on our agenda. I am glad you are addressing the need for a sports facility in the Helena Area. I think that a pool is critical and a fieldhouse would be a good addition to what Helena can offer for recreation and tournaments. I think that Helena currently cannot financially support a facility of this size and I know that there are infrastructure and housekeeping expenses that will certainly take precedent over a sports facility if property taxes are discussed. I hope you are looking at existing facilities like the City or the YMCA pool to refurbish or demolish and rebuild. This would enable an existing organization to expand its outreach and service to the Helena Community as well as provide services to organizations who could utilize it. Good luck in this very worthwhile endeavor. Mary Ann George maryannhcc2015@gmail.com
- Please consider your local homeschooling community in your programming! We often bring business to facilities in quieter parts of the day. Win-win.

- It is an embarrassment to the capital city that we do not have adequate facilities for competitive swimming. We lose outstanding athletes every year due to this deficiency. Please build this quickly.
- I don't understand the need for another gym, another pool, more class space. It appears to me that many of the community's needs and wants are met by what we have. This survey has not adequately explained to me the reason behind *another* facility.
- I would not pay a monthly fee because we could not afford that. I would only pay per use.
- When oil revenues go back up have the state build it from oil revenues. Lewis and clark county taxes are already way too high and would never pass a bond proposition. Lived in Alaska for 38 years and the state built many multipurpose sports complexes built with oil revenues!
- Capital costs and operational & maintenance costs.
- When I indicated the need for Fieldhouse with turf, I am thinking of a 'large turf space' for turf sports. I am not thinking of a spectator venue with fixed seating. I feel that a tournament type 'fieldhouse' venue is a different project.
- You did ask about seasonality of use. I think I would use the pool/walking track a LOT in the winter but maybe 1-2 x per week in the summer. Just a suggestion if there's a next survey. Thank you!
- this community is in need of a public swimming center that can be used year round. Consider coordinating with the YMCA or the school district and help expand their facilities. New larger pool with water features for the kids. See partnership with Kamas Utah/south summit school district and their facility.
- Probably standard practice but please have donation site set up so donors can donate in recognition of current coaches, etc.
- I would only use the new facility for pickleball in winter. At his point the YMCA gym is adequate but not optimal for that activity. The number of pickleball players in Helena and surrounding areas is growing exponentially so soon the existing 3 YMCA courts will not be enough to accommodate all of us. No other indoor facility in the area offers 3 or more pickleball courts with reserved play times so we ARE grateful for how the YMCA is inclusive of picklers. In summer we play at Barney Park. I don't enjoy swimming but who knows, that may change in the future. I don't use the YMCA for any sports activity (other than pickleball) in part because their bicycle equipment is not very good, I don't like working out in their dungeon (= basement), their facility is not very clean or well kept up, and they don't offer WiFi. They do lots of good things for kids, and that's great!
- I am in full agreement that Helena needs an aquatic center, but It has been evident from the beginning that this initiative is spearheaded by those who also want an aquatic center. Swimming is one of fitness routines I use to stay in shape, but the focus of this group should be a multisport/multi event complex with the hope that as a side note an aquatic complex could be part of it. The income to support the complex will not come from parents of the swim team, swim meets and lap swimmers. It is too small a group to

generate the income to support such a project. The building of a Billings Metra should be the focus of the group, not an aquatic center as in Bozeman, unless you have a extremely generous benefactor who is supporting the aquatic scenario. Tax payers will not build schools, law enforcement facilities, nor will they build a "swimming pool". Helena will certaininly not support construction of a "swimming pool" by a tax and certainly not support an endeavor that could not financially support itself after construction. The Billings Metra concept could provide the revenue needed to repay loans and support its expenses.

- I don't like the idea of a tax payer funded facility for recreational activities. Tax breaks sure. Pools do not make enough money to cover the cost. We don't need another health club with the specialty gyms out there i.e., crossfit, martial arts clubs, and personal trainers.
- A facility that will be useful for Helena. Most important element to me is a competitive aquatic center for use by age group swimming and high school swimming. Swimming is one sport that is good for all ages.

Appendix C – Program Worksheet

Helena Multi-Sport Recreation Complex

Helena, MT

Facility Program & Budget

Original Date: September 22, 2016
Revised/Printed: October 25, 2016
Midpoint Construction: February 1, 2019

BARKER RINKER SEACAT ARCHITECTURE

OPTION 1		OPTION 2a		OPTION 3	
Average Cost/ SF	$ 355	Average Cost/ SF	$ 338	Average Cost/ SF	$ 300
Gross Area	46,955	Gross Area	76,044	Gross Area	128,889
Building Budget	$ 16,669,970	Building Budget	$ 25,682,044	Building Budget	$ 38,625,029
Outdoor Pool		Outdoor Pool		Outdoor Pool	
Outd. Pool Bldg	-	Outd. Pool Bldg	-	Outd. Pool Bldg	-
Outd. Pool Budget	$ -	Outd. Pool Budget	$ -	Outd. Pool Budget	$ -
Total Gross Area	46,955	Total Gross Area	76,044	Total Gross Area	128,889
Total Budget	$ 16,669,970	Total Budget	$ 25,682,044	Total Budget	$ 38,625,029

1	2	3	Program Space		Net Total	Net Detail	Grossing Factor	OPTION 1 Gross Area	OPTION 1 Budget	OPTION 2a PHASE 2	OPTION 2a Budget	OPTION 3 Gross Area	OPTION 3 Budget	Notes
x	x	x	**Facility Administration Spaces**		1,968		115%	2,263	$ 551,000	2,263	$ 551,000	2,263	$ 551,000	
x	x	x	**Lobby and Support Spaces**		See Total		110%	4,356	$ 956,284	4,634	$ 1,046,881	4,872	$ 1,124,023	
			x Pre-Control Lobby			1,200								
			x Lounge			800								
			x Control Desk			288								
			x Vending Machines			80								
			x Men's Toilets			See Total		237	$ 77,142	377	$ 122,441	495	$ 161,012	Apply to various locations in building
			x Women's Toilets			See Total		237	$ 77,142	377	$ 122,441	495	$ 161,012	Apply to various locations in building
			x Custodial Closets			40								
			x Building Mechanical Room			300								
			x Sprinkler Valve Room			80								
			x Main Electrical Distribution Room			120								
			x Maintenance/ Receiving/ Loading			240								
			x Custodial Workroom/ Supply			100								
			x Maintenance Office			80								
			x General Building Storage			200								
x	x	x	**Locker Spaces**		See Total		115%	2,916	$ 1,073,686	3,765	$ 1,386,163	4,487	$ 1,652,006	
			x Men's Locker			See Total		722	$ 265,843	1,147	$ 422,081	1,508	$ 555,003	Size based on metric of activity area & pool area
			x Women's Locker			See Total		722	$ 265,843	1,147	$ 422,081	1,508	$ 555,003	Size based on metric of activity area & pool area
			x 6 Cabana Family Locker Room			1,215								
			x First Aid			64								
	x	x	**160 Person Community / Events Room**		2,000		115%	-	$ -	2,300	$ 653,000	2,300	$ 653,000	
			x Community Room			1,800								Seats 160, Dividable into two 1,200 sf rooms
			x Storage			200								
	x	x	**Gym 4 - (2) Collegiate or (4) High School**		27,000		105%	-	$ -	28,350	$ 7,874,000	28,350	$ 7,874,000	
			x Gymnasium	2@94x50, 4@84x50		24,816								2 volleyball courts, 4 badminton courts
			x Spectator Seating	226 Seats		1,584								
			x Storage			600								
x			**Gym 4a - (1) Collegiate or (2) High School**		15,912		105%	16,708	$ 4,590,000	-	$ -	-	$ -	
			x Gymnasium	1@94x50, 2@84x50		13,728								2 volleyball courts, 4 badminton courts
			x Spectator Seating	226 Seats		1,584								
			x Storage			600								
		x	**Soccer Field House**		49,414		105%	-	$ -	-	$ -	51,885	$ 12,600,000	
			x Field House Enclosure			46,144								
			x 2 Soccer Fields	2 @ 200x85										
			x Spectator Seating	40 Seats		1,120								
			x 4 Team Locker Rooms			1,000								
			x Referee Changing Room			150								
			x Storage			1,000								
	x	x	**12 Laps/Mile Elevated Walk Jog Track**		5,500		105%	-	$ -	5,775	$ 924,000	5,775	$ 924,000	
			x Walk/Jog Track			5,000								3 Lanes
			x Stretching Area			500								
x	x	x	**Aquatics Support**		740		115%	851	$ 221,000	851	$ 221,000	851	$ 221,000	
			x Guard Room			300								
			x Aquatics Supervisors Office			120								
			x Head Lifeguard Office			120								
			x First Aid			100								
			x Vending at Pool Deck			100								
x			**8-Lane x 25-Yard Pool**		12,916		105%	13,562	$ 5,834,000	-	$ -	-	$ -	344 Bather Load
			x 8,316 Natatorium			8,316								12' Decks
			x 8-Lane x 25-Yard Pool	4,500 SF										
			x Spectator Seating for 400			3,000								
			x Meet Management Room/ Multi-Purpose Room			400								
			x Pool Equipment Room			800								
			x Pool Storage			400								

			Program Space		Net Total	Net Detail	Grossing Factor	OPTION 1 Gross Area	OPTION 1 Budget	OPTION 2a PHASE 2	OPTION 2a Budget	OPTION 3 Gross Area	OPTION 3 Budget	Notes
	x	x	**25-Meter x 25-Yard Pool**		18,568		105%	-	$ -	19,496	$ 8,244,000	19,496	$ 8,244,000	523 Bather Load
			x 12,118 Natatorium			12,118								15' Decks, 17' at Diving
			x 25-Meter x 25-Yard Pool	6,094 SF										
			x Spectator Seating for 400			3,750								
			x Meet Management Room/ Multi-Purpose Room			1,200								
			x Pool Equipment Room			900								
			x Pool Storage			600								
x			**2,500 Recreation Activity Pool**		6,000		105%	6,300	$ 3,444,000	-	$ -	-	$ -	250 Bather Load
			x 5,500 Natatorium			5,500								
			x 2,500 Recreation Activity Pool	2,500 SF										
			x Slides, Spray Features, Whirlpool											
			Lazy River, Slides, Features,											
			Sprays and Jets											
			x Supplemental Sanitation Water Treatment											
			x Pool Equipment Room			400								
			x Pool Storage			100								
	x	x	**3,500 Recreation Activity Pool**		8,200		105%	-	$ -	8,610	$ 4,782,000	8,610	$ 4,782,000	350 Bather Load
			x 7,700 Natatorium			7,700								
			x 3,500 Recreation Activity Pool	3,500 SF										
			x Slides, Spray Features, Whirlpool											
			Lazy River, Slides, Features,											
			Sprays and Jets											
			x Supplemental Sanitation Water Treatment											
			x Pool Equipment Room			400								
			x Pool Storage			100								

	OPTION 1		OPTION 2a		OPTION 3	
Recreation Uses	36,569	$ 13,868,000	42,735	$ 13,580,000	94,620	$ 26,180,000
Percent	78%		76%		86%	
Community Uses	-	$ -	2,300	$ 653,000	2,300	$ 653,000
Percent	0%		4%		2%	
Other Uses	-	$ -	-	$ -	-	$ -
Percent	0%		0%		0%	
Support Uses	10,385	$ 2,801,970	11,513	$ 3,205,044	12,473	$ 3,548,029
Percent	22%		20%		11%	
Total	46,955	$ 16,669,970	56,548	$ 17,438,044	109,393	$ 30,381,029

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Appendix D – Operations Budget Backup

Helena Multi-Sport Recreation Complex-Option 1 Operating Expenses		
Category	**Facility**	
Personnel (new positions)		
Full-time	432,000	
Part-time	615,399	
Total	$ 1,047,399	
Commodities		
Office supplies	10,000	
(forms, ID film)		
Chemicals	25,000	
Maintenance/repair/materials	18,000	
Janitor supplies	16,000	
Recreation supplies	30,000	
Uniforms	3,500	
Printing/postage	20,000	
Concession food	-	
Items for Resale	5,000	
Other Misc. expenses	2,000	
Total	$ 129,500	
Contractual		
Utilities ($4.00 SF/aquatics-$2.50 SF/dry)	149,000	
Water/sewer	27,000	
Insurance	35,000	
(property & liability)		
Communications	4,000	
(phone)		
Contract services	40,000	
Rental equipment	2,000	
Advertising	10,000	
Training	3,500	
Conference	2,000	
Trash Pickup	3,000	
Dues/subscriptions	1,500	
Bank charges	20,000	
Other	3,000	
Total	$ 300,000	
Capital		
Replacement fund	$ 30,000	
Grand Total	**$ 1,506,899**	

Helena Multi-Sport Recreation Complex-Option 1 Revenues	
Category	**Facility**
Fees	
Daily Admissions	185,400
3 Month Pass	22,025
Monthly Annuals*	320,454
Annuals	160,353
Group/Corporate	20,000
Aquatic Rentals	95,110
General Facility Rentals	29,110
Total	$ 832,452
Programs**	
Aquatics	77,299
Fitness/General	194,367
Total	$ 271,666
Other	
Resale items	6,250
Concessions	-
Special events	1,000
Vending (net)	8,000
Total	$ 15,250
Grand Total	**$ 1,119,368**

Helena Multi-Sport Recreation Complex-Option 2 Operating Expenses		
Category	**Facility**	
Personnel (new positions)		
Full-time	573,750	
Part-time	668,685	
Total	$ 1,242,435	
Commodities		
Office supplies	12,000	
(forms, ID film)		
Chemicals	35,000	
Maintenance/repair/materials	20,000	
Janitor supplies	18,000	
Recreation supplies	40,000	
Uniforms	4,500	
Printing/postage	23,000	
Concession food	-	
Items for Resale	8,000	
Other Misc. expenses	2,000	
Total	$ 162,500	
Contractual		
Utilities ($4.00 SF/aquatics-$2.50 SF/dry)	233,500	
Water/sewer	32,000	
Insurance	40,000	
(property & liability)		
Communications	5,000	
(phone)		
Contract services	45,000	
Rental equipment	2,000	
Advertising	15,000	
Training	4,000	
Conference	3,000	
Trash Pickup	3,000	
Dues/subscriptions	1,500	
Bank charges	25,000	
Other	3,000	
Total	$ 412,000	
Capital		
Replacement fund	$ 35,000	
Grand Total	**$ 1,851,935**	

Helena Multi-Sport Recreation Complex-Option 2 Revenues	
Category	**Facility**
Fees	
Daily Admissions	230,400
3 Month Pass	25,525
Monthly Annuals*	365,549
Annuals	182,918
Group/Corporate	35,000
Aquatic Rentals	101,440
General Facility Rentals	54,910
Total	$ 995,741
Programs**	
Aquatics	87,324
Fitness/General	304,183
Total	$ 391,507
Other	
Resale items	10,000
Concessions	-
Special events	1,500
Vending (net)	10,000
Total	$ 21,500
Grand Total	**$ 1,408,748**

Helena Multi-Sport Recreation Complex-Option 3 Operating Expenses		
Category	**Facility**	
Personnel (new positions)		
Full-time	627,750	
Part-time	739,793	
Total	$ 1,367,543	
Commodities		
Office supplies	15,000	
(forms, ID film)		
Chemicals	35,000	
Maintenance/repair/materials	25,000	
Janitor supplies	20,000	
Recreation supplies	50,000	
Uniforms	5,000	
Printing/postage	25,000	
Concession food	-	
Items for Resale	10,000	
Other Misc. expenses	2,000	
Total	$ 187,000	
Contractual		
Utilities ($4.00 SF/aquatics-$2.50 SF/dry)	366,000	
Water/sewer	35,000	
Insurance	50,000	
(property & liability)		
Communications	5,000	
(phone)		
Contract services	50,000	
Rental equipment	2,000	
Advertising	20,000	
Training	4,000	
Conference	3,000	
Trash Pickup	3,000	
Dues/subscriptions	1,500	
Bank charges	30,000	
Other	3,000	
Total	$ 572,500	
Capital		
Replacement fund	$ 50,000	
Grand Total	**$ 2,177,043**	

Helena Multi-Sport Recreation Complex-Option 3 Revenues	
Category	**Facility**
Fees	
Daily Admissions	258,300
3 Month Pass	28,050
Monthly Annuals*	410,643
Annuals	205,482
Group/Corporate	50,000
Aquatic Rentals	101,440
General Facility Rentals	192,450
Total	$ 1,246,366
Programs**	
Aquatics	87,324
Fitness/General	481,858
Total	$ 569,182
Other	
Resale items	12,500
Concessions	-
Special events	2,000
Vending (net)	12,000
Total	$ 26,500
Grand Total	**$ 1,842,048**

Economic Benefits of the Proposed Multi-Sport Complex in Helena, Montana

May 4, 2017

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EXECUTIVE SUMMARY

This report identifies, and where possible quantifies, the potential economic benefits of a potential multi-sport complex in Helena, Montana. Plans for the facility include a gymnasium with basketball courts, a competition-sized pool capable of hosting swim meets, a community activity pool, an elevated walk/jogging track, a fieldhouse for sports such as soccer and lacrosse, as well as other spaces. The economic benefits of the multi-sport complex may include:

- Attracting and retaining residents and businesses by improving amenities and quality of life in the area,
- Improving health outcomes and saving users money on health care costs, and
- Increasing tourism in the Helena area and thus increasing spending by attracting out-of-town visitors for athletic tournaments.

Quality of life is an important factor that contributes to the growth and decline of communities. Case studies from around the United States demonstrate that improving quality of life is an effective and sustainable way to retain residents, increase tourism, and bolster economic development. Communities with a high quality of life are more effective at retaining existing residents and attracting new residents who have very valuable skillsets. This, in turn, provides an area with economic development as residents contribute to local businesses, start new businesses, and spend a portion of their earnings in the community.

Amenities, including recreational opportunities, are an important contributor to an area's overall quality of life. Information gathered through focus groups and surveys in the Helena area highlight the value of recreation amenities to residents. City and County leaders and residents voiced concern over the lack of adequate athletic facilities in the area and have a strong desire to see new facilities constructed. Survey respondents commonly recognized that a facility would enhance quality of life and economic development in the area. Statistics show that while the Helena area has a good quality of life, there is room for improvement, especially regarding health outcomes related to lack of exercise. In this regard, a new sports facility has the potential to improve public health and save users money on health care costs.

Furthermore, one of the economic advantages of a new sports facility would be the increased spending by out of area visitors attending sports tournaments. Athletes, their families, friends, and coaches would come to Helena for these tournaments, and spend money at local hotels, restaurants, retail stores, and other local businesses. Such a facility has the potential to provide substantial economic benefits to the area.

Where possible, we quantify the economic benefits that are likely to result from a new multi-sport complex. Among this study's most significant findings are that:

- Lewis and Clark County lacks the sports facilities common in other large Montana cities, which presents an opportunity for a new sports complex to improve the area's relative quality of life.
- For every 30 households that the new sports facility helps attract and retain in the local area (representing approximately two to five percent of the projected annual membership), their household spending alone could expand the local economy by approximately 15 jobs and over

$572,000 per year in labor income.[1] Additional benefits from attraction/retention of households would likely be felt from additional skilled labor in the regional labor force, and potentially direct job creation if entrepreneurs were among those attracted/retained in the area.

- Visitor spending during sports tournaments has the potential to bring in $1.36 million per year to the Helena area, which would support approximately 20 jobs and $487,000 in income annually for local workers. This level of labor income exceeds the annual budget shortfall for the proposed facility identified in the facility feasibility study of roughly $103,000 to $335,000 (Ballard King & Associates Ltd, 2017). Thus, at the community level, community financial support for the facility to make up for operating losses would likely be more than recouped in total increased community income.
- If the facility encourages physical activity by individuals who are currently physically inactive, then the facility could provide such users up to $1,500 per year in health care savings, and can potentially save local employers over $600 per employee per year (in increased productivity and reduced absenteeism) for such employees that use the facility.
- Retirees, whose income is frequently independent of local labor markets, tend to use quality of life when making decisions about whether to stay in or relocate to communities. For every 30 retiree households that chose to relocate to the Helena area, household spending could expand the local economy by over 12 jobs and $504,000 per year in labor income.

[1] Note: these estimates do not include the household income and employment in the 30 households – just the income and employment supported by their spending in the local economy.

1 INTRODUCTION

This study evaluates the economic benefits of a proposed multi-sport complex in the Helena area. While a final design for the facility has yet to be determined, proposed plans include a gymnasium with basketball courts, a competition-sized pool capable of hosting swim meets, a community activity pool, an elevated walk/jogging track, a fieldhouse for sports such as soccer and lacrosse, locker rooms, and an administration area with other support spaces. A recent feasibility study indicated that there is a service gap in the area's existing indoor recreation facilities and estimated what the local demand for a multi-sport complex would be (Ballard King & Associates Ltd, 2017).

To further explore the potential of the sports complex, Helena Regional Sport Association contracted with Highland Economics to evaluate the economic benefits of the new facility. Rather than examining the more commonly-recognized economic impacts of such a facility, such as the economic impact of construction and operations expenditures, this research focuses on the indirect economic benefits, which include:

- Enhancing economic development through attraction and retention of residents and businesses by enhancing the area's quality of life,
- Improving the public's health and avoiding health care costs, and
- Attracting tourism spending through hosting sports tournaments.

This study includes a quantitative analysis of these benefits, as well as a qualitative analysis of the area's current quality of life and its connection with economic development. The remainder of this report explains how the proposed multi-sport complex has the potential to improve quality of life in the area, improve health outcomes, save users money on health care, and bolster the local economy by attracting and retaining residents and increasing non-resident spending.

2 Economic Development Benefits: Attract and Retain Businesses and Residents

Economic development is critical to a community's quality of life, and vice versa. An area with a high quality of life will attract residents, businesses, and tourists, which will further expand its economy. A community that fully develops its economy is generally more able to fund public infrastructure that enhances the area's quality of life, such as schools, streets, libraries, public parks, sidewalks, and bike lanes. In this section, we describe the connection between economic development and quality of life, and how a sports complex could play a role in this relationship.

Research has shown that quality of life is an important factor in attracting and retaining residents and developing the local economy. Talented workers are more likely to locate in places that have a high quality of life (Florida, 2000). Retirees are highly-mobile and attracted to places with amenities (American Planning Association, 2002). As the following examples illustrate, communities that are successful at bolstering their quality of life also tend to thrive economically. Investments in quality of life can help develop all sectors of an economy, and foster a more diversified, self-reliant, and resilient economy less vulnerable to outside forces by:

- Attracting and retaining young people and retirees;
- Adding high-paying and geographically-mobile professional, technical, and service sector jobs;
- Encouraging businesses to redevelop and reinvest in the community; and
- Growing the tourism and visitor services sectors.

Some communities have succeeded by investing in quality-of-life improvements, which are then followed by economic development gains. One such example is Bend, Oregon. The city was historically dependent on the timber industry, which saw significant declines in the 1980's. As the city's economy suffered, they decided to create a plan to diversify their economy. Central priorities of this plan were to improve the area's quality of life and maintain and develop its cultural, historic, and entertainment resources. To accomplish this, the City cleaned up the industrial contamination in its downtown area and repurposed it to house businesses and residences. The clean-up allowed visitors and residents to fish and kayak in the Deschutes River in the City's center. When Bend suffered during the Great Recession, the City doubled-down on its quality of life assets, and focused on recruiting and supporting entrepreneurs who have the flexibility to choose where to live, and are attracted to vibrant communities that offer walkability, cultural amenities, and recreation opportunities. The strategy proved a success and helped bolster economic development by making the area a desirable place to live, work, and start a business. The City has since experienced low business vacancy rates in downtown, falling unemployment, and some of the best job growth in the state outside of Portland (U.S. Environmental Protection Agency, 2015).

Another example of a community putting quality of life first is Dubuque, Iowa. After several large employers left in the 1980's, the City's economy began to decline. The unemployment rate rose to 23 percent. As other businesses left, the downtown vacancy rate climbed to 55 percent, and the City's population fell by 7.8 percent between 1980 and 1990. To combat these trends, Dubuque adopted plans to rebuild the city, one of which was to redevelop their riverfront area. Similar to Bend, the City's riverfront was unusable to residents and tourists, so transforming it into a walkable, mixed-use

neighborhood was seen as a way to increase the area's amenities. In addition to creating a community park, funding was used to help create or restore nearby attractions that improved the quality of life, including museums, a resort, brewery, casino, and a movie theater. Additionally, a community health center was one of 10 projects selected to help revitalize the city.

These efforts, as well as others, helped to turn Dubuque's economy around. The number of workers in the area nearly doubled since 1983, unemployment fell to half the nation's average, and its gross domestic product grew at one of the highest rates in the county. The City has also won a number of awards for its quality of life, including being named one of "100 Best Communities for Young People" by America's Promise Alliance, "Best Small City to Raise a Family" by *Forbes*, and "Most Livable Small City in the United States" by the Conference of Mayors (U.S. Environmental Protection Agency, 2015).

Other cities have used this approach, as well. As part of their economic development strategy, Paducah, Kentucky expanded a public park and created a harbor, boat launch, dock, and marina on the Ohio River. Mount Morris, New York constructed a multi-use trail along the Genesee River. Roanoke, Virginia made outdoor recreation an economic driver, and created greenways, improved biking amenities, placed natural areas under conservation easements to ensure their future existence (U.S. Environmental Protection Agency, 2015). In each case, these communities improved their quality of life as a way to foster economic development.

Areas can also use economic development as way to improve quality of life, as was demonstrated by Emporia, Kansas. As agricultural prices declined in the late 1970's and early 1980's, many of Emporia's agriculture-related factories and businesses moved out of town. In 1991, local organizations created a program to encourage business growth in the City's downtown. Efforts focused on securing funding, creating favorable finance terms, and easing the burden of bureaucracy. The revitalization efforts led to a decline in downtown vacancy and in 2005 an award of "Great American Main Street." Since that time, the city has used its success to improve the quality of life. Downtown revitalization spurred the formation of a new arts and entertainment district. Pedestrian and bicycle connections were added and a park for downtown. New mixed-use development has increased the availability of housing and business space (U.S. Environmental Protection Agency, 2015).

These examples demonstrate the mutually-reinforcing relationship between quality-of-life amenities and economic development. The next section explores recreation, specifically, as a contributor to quality of life, with a focus on contributions in the study area.

2.1 Recreation and Quality of Life

Recreation amenities, including sports facilities, are an important contributor to and component of an area's quality of life. It is notable in the above examples that the communities seeking to improve their quality of life included recreation amenities in their top priorities. There is a substantial body of literature identifying recreation amenities, particularly outdoor recreation amenities, as important resources to bolster quality of life, retain residents and businesses, and support economic development. For example, one study found that non-metro counties with high outdoor recreation amenities experience migration gains 2.5 times that of non-metro counties with scarce recreation amenities. This in-migration has shown consistency over decades and even proved reliable during times of economic downturn (Johnson & Beale, 2002). An abundance of cultural and recreational amenities has been found to lower out-migration rates of young college-educated populations and young married couples

(Whisler, Waldorf, Mulligan, & Plane, 2008). While little research to date has been done focusing on the benefits of indoor recreation facilities, as discussed below in **Section 2.2**, Helena area residents view the proposed sports facility as an opportunity to enhance their quality of life.

The importance of recreation to quality of life was emphasized in a 2013 report to decision makers in the Helena area. The report by Beck Consulting was an effort to research, gather, and analyze information on the outdoor recreational opportunities in Helena and Lewis and Clark County. While its focus was outdoor recreation, the study's conclusions are likely also relevant to indoor sports facilities. The authors stated that recreation programs and infrastructure "contribute to residents' well-being and quality of life, and make the area attractive for businesses to locate in and attract talent." They also acknowledged that "participating in outdoor sports and recreation makes a significant contribution to the general health and quality of life for the active adults and children of the area." The significance was further emphasized in a later passage:

> "*Some of the more indirect, yet also important benefits of parks and trails included the ability of the area to attract new businesses—not related to recreation and the ability of existing business to attract strong talent and highly qualified individuals for job vacancies-- because of the quality of life connections with recreation opportunities offered by parks and trails."* (Beck, Cossitt, & Kohley, 2013)

2.2 Current Quality of Life in Lewis and Clark County and Role of HRSA

We begin by exploring the current quality of life in Lewis and Clark County and comparing it to similar areas in Montana; specifically, counties that also contain large population centers, as Lewis and Clark does. These include the counties of Cascade, Gallatin, Missoula, Silver Bow, and Yellowstone, which include the cities of Great Falls, Bozeman, Missoula, Butte, and Billings, respectively. This comparison is especially relevant because these are not only peer communities, but share a close connection through migration. Recent data from the Internal Revenue Service shows that a large portion of the migration into and out of Lewis and Clark County comes from or goes to these other counties (Internal Revenue Service, 2016). In this way, these counties can be seen as competitors for the same residents, and quality-of-life factors could play a role in residents' location decisions. We examine a variety of aspects associated with quality of life in this areas, but focus on those aspects that are especially relevant to sports recreation facilities: the availability of similar facilities and health factors impacted by the presence of these facilities.

2.2.1 Indoor Recreational Facilities

The area in and around Helena currently offers a mix of public, private, and non-profit indoor recreational sports facilities. For sports requiring a gymnasium, Carroll College, Capital High School, Helena High School, and the Helena Family YMCA provide the most substantial facilities, with a number of small gyms located in local elementary schools, The Salvation Army, and East Helena City Hall. For aquatic sports, there are small indoor lap pools at the YMCA and two private health clubs, and a few outdoor pools, but no indoor public aquatic facilities that could host competitions. Fitness facilities are available primarily at small, private health clubs. The most comprehensive facility is the YMCA, but the need for a significant upgrade and inability to expand limit the opportunities it can provide (Ballard King & Associates Ltd, 2017). In short, the study area currently offers a variety of indoor sports and fitness

facilities, but none that offers the combined opportunities of the proposed multi-sport complex, or the space for large athletic tournaments.

Other Montana communities of Helena's approximate size typically offer larger, multi-sport complexes, but these facilities are often provided by colleges. However, other Montana communities also have public facilities. For example, the Billings YMCA has an expansive facility open to the public, which includes basketball courts, two pools, free-weights rooms, a variety of cardio and fitness studios, racquetball courts, an indoor rock climbing wall, and specially-designated children's areas. Montana State University (MSU) Billings also houses a large recreation center, which includes a recently-remodeled fitness center, 25-yard swimming pool, running track, gymnasium, climbing wall, and racquetball courts. While most of the center is only available to students, staff, and faculty of MSU, as well as their immediate family members, the pool is open to the public and is capable of hosting swim meets. Also in Billings, the Sports Plex offers a weight-lifting center and indoor field.

In Missoula, the University of Montana's Recreation Center offers a fitness center, swimming pool, golf course, climbing wall, outdoor fields, and indoor courts, but similar to Billings, passes are only available to students, staff, faculty, and their guests. The City Life Community Center is open to the public, and provides a 34,000-square-foot facility for teens, offering basketball, volleyball, pickle ball, and an indoor paintball facility. Missoula also has two Peak Health & Wellness locations that collectively offer a competition swimming pool; racquetball, pickleball, handball, basketball, wallyball, and tennis courts; an indoor track; and cardio and weight rooms. In Butte, Montana Tech's HPER Complex offers a basketball court, large fitness center, pool, dance studio, and racquetball courts but, once again, access is restricted to those affiliated with the school. For the public there are aquatic and gym facilities at the Butte YMCA. In Bozeman, MSU's Marga Hosaeus Fitness Center has a pool, gym, fitness center, and outdoor fields. While the pool and running track are open to the public, the other facilities have restrictions similar to MSU recreational centers in other cities. Bozeman facilities also include the Gallatin Valley YMCA, which opened in 2017 but contains just 20,000 square feet of fitness and locker room space, and focuses primarily on youth programing. There is an ongoing effort to raise money for a gym and swimming pool adjacent to the existing Gallatin Valley YMCA (Stevenson, 2017). Great Falls does not appear to have any multi-sport complexes.

In summary, Helena and Lewis and Clark County lacks the quality of sports facilities found in other large Montana communities (with the exception of Great Falls). While access to many of these facilities located on college campuses is somewhat restricted, they still provide benefits to a significant portion of the local population, particularly as public access is generally available at the aquatic centers. Additionally, colleges employ large numbers of faculty and staff that are able to use the on-campus recreation centers, and are often able to bring family members and guests. Furthermore, local schools can often rent out the college's facilities for practices and large events. These opportunities enhance the quality of life in other Montana communities, but are currently lacking in the Helena area. The proposed sports complex could put the Helena region on par with other large Montana cities, and could even surpass them in terms of public access to indoor sports facilities.

The quality and availability of sport facilities in the Helena area was also reviewed in a recently completed feasibility and marketing study by Ballard King and Associates of the proposed facility. Their feasibility study included focus groups and an online survey to gather the public's input on the proposed

sports complex. The comments gathered from these efforts provided insights into the community's current quality of life and the potential value of a new sports complex.

Many of the comments from the focus groups and the survey focused on the inadequacy of recreational facilities that are currently available. Respondents cite the "need for more gym space," "need for a competitive pool," "a big demand for gym space and a competitive pool," and "a definite need for this type of facility." In sum, the current facilities are not meeting the public's needs. The YMCA "has a methane issue" resulting from being built "next to a landfill" and "needs to be replaced." Additionally, the "loss of the Carroll College pool really hurt competitive swimming" since it was the area's "only true competitive pool."

A number of comments specifically mentioned how a new facility would enhance quality of life in Helena and surrounding areas. One respondent succinctly stated that the facility "will be a quality of life issue." Another identified the facility "as a way to improve the mental and physical health of the area residents." One respondent mentioned the facility's ability to provide opportunities that "have benefits outside of sports," such as attaining "an individual's goals" that "keep a focus in life." Other comments emphasized the quality of life benefits to specific populations. One talked about the importance of providing "kids a chance to feel like they have a place to go and be active and fit." The sports complex is seen as a place for kids to "work on positive skills" and a way to "keep them from going towards [a] more negative environment." A healthcare provider stressed the importance of such a facility to middle-aged and senior populations, who "need weight management" and "suffer varying degrees of arthritis." During their self-described frequent interaction with this population, this respondent found the lack of "access to this type of facility to be quite limiting to patient progress." These comments directly acknowledge the potential for a new indoor athletic/recreational facility to positively impact people's health and enhance their quality of life.

2.2.2 Other Quality-of-Life Indicators

Other factors also play important roles in determining an area's quality of life, economic development being one example. This factor was raised repeatedly during the public engagement portions of the Ballard King and Associates feasibility and market study. A common theme among the public's comments was the potential for a sports complex to bring new economic activity to the area. Survey respondents commonly mentioned sports tournaments and "the revenue they would bring into Helena," predicting the facility would "bring an economic benefit to the area," which "would be a nice boost to the Helena economy and make us more of a regional destination." Another respondent states that "indoor basketball courts and more tournaments would generate money in the Helena area." One exclaims: "Events pour dollars into our community to all our businesses!" Respondents also brought up how other communities have benefited from this kind of economic activity: "Missoula is busy almost every weekend in the winter with tournaments. The hotels, shopping, and restaurants benefit as well as the kids getting a chance to compete." These comments recognize the potential for a sports complex to improve the area's quality of life by bringing in new economic activity.

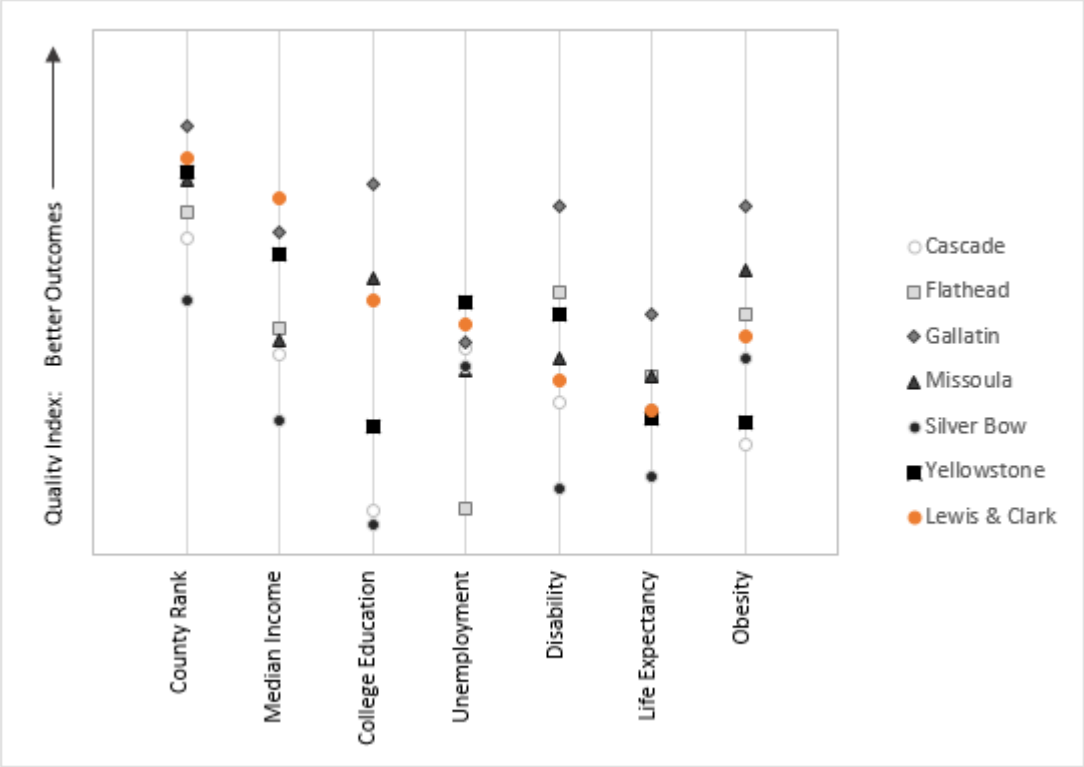
In 2014, The New York Times sought to compare the general quality of life in counties across the U.S. in their article "Where are the hardest places to live in the U.S.?" To rank the counties, the article used six indicators of an area's quality of life: Income, education, unemployment, disability, life expectancy, and obesity. We display the results in **Table 2-1** and **Figure 2-1** for selected Montana communities as a comparison of the general quality of life between the areas.

Table 2-1: General Measures of Quality of Life in Montana Communities

Metric	Lewis & Clark	Cascade	Flathead	Gallatin	Missoula	Silver Bow	Yellowstone
U.S. Rank [1]	294	858	681	54	451	1304	395
Median income	$54,535	$43,817	$45,545	$52,211	$44,653	$39,211	$50,608
College education	38%	23%	29%	45%	39%	22%	29%
Unemployment	4.9%	5.4%	9.0%	5.3%	5.9%	5.8%	4.4%
Disability	1.2%	1.3%	0.8%	0.4%	1.1%	1.7%	0.9%
Life expectancy	78.30	78.3	79.1	80.5	79.1	76.8	78.1
Obesity	30%	35%	29%	24%	27%	31%	34%

Source: (Flippen, 2014)
1/ Rank out of 3,135 U.S. counties.

Figure 2-1: Comparison of Quality-of-Life Metrics in Montana Communities



According to article's indices, Lewis and Clark County has a good quality of life compared to other U.S. counties, ranking in the top 10 percent. It also out-ranks the other Montana counties with the exception of Gallatin, which ranked in the top two percent nationally. Lewis and Clark benefits from the highest median income among its peers and some of the lowest rates of unemployment. In college education, it is only bested by Gallatin and Missoula, both of which undoubtedly benefit from the large state colleges they each host. In measures of health, the study area generally has better health outcomes than Cascade, Silver Bow, and Yellowstone counties, while trailing behind Gallatin, Flathead, and Missoula counties. This analysis indicates that Lewis and Clark County benefits from a generally high quality of life. This could amplify the ability of a sports facility to attract and retain residents, a potential we will explore in later sections.

2.3 Economic Development Benefit of Resident Attraction/Retention

Previous sections have explained how a multi-sports complex has the potential to improve quality of life and thereby attract and retain residents. Here, we illustrate how the attraction and retention of residents affects the level of economic activity in the Helena area.

Certain segments of the United States' population are more mobile than others, and thus are strongly influenced by the quality of life in an area. These demographic groups include:

- Retirees whose income is no longer tied to employment,
- Young professionals who are choosing where to start their careers and have the skills to be marketable in many geographic areas,
- Married professionals who are choosing where to start a family and also possess marketable skills that allow geographic movement, and
- Entrepreneurs and mobile professionals who have a choice of where they would like to live and start businesses.

Attracting these people can bring substantial economic benefits to an area, as by increasing local spending and taxes, skilled labor, and new jobs and businesses. In this analysis, due to ease of quantification, we focus solely on the benefits of additional household spending in the local economy that would result from retaining and attracting these mobile populations in the Helena area. It is important to recognize that the direct economic benefits of a high-skilled labor force are likely far greater, though more difficult to measure.

To assess the economic impact of retaining and attracting such households, we focus on three of these household types: married professionals with children, retiree couples, and single professionals. For each of these household types, we estimate how household spending by 10 such households supports economic activity in the County economy and increases the number of jobs and local area income.

U.S. Census data was used to estimate the median household income over the last 12 months for each of these three household types in the County.[2] The total economic impact on the economy of the County was analyzed by looking at the spending of each household type. This was done using an economic model (using IMPLAN data and software) of the county economy. **Table 2-2** summarizes the

[2] The corresponding Census categories were "married-couple families," "heads of household 65+ years old," and "25-year-olds and older with a Bachelor's degree."

results. Due to their high income, household spending by married professional families with children have the highest economic impact on the economy. Retaining/attracting 10 such households would support approximately seven jobs and $256,000 in local income on an annual basis. Retiree couples and single professionals have similar incomes and therefore typically have a similar economic impact. Attracting or retaining 10 of these types of households would support approximately four jobs and approximately $150,000 to $170,000 in annual income.

Table 2-2: Annual Economic Impact of Retaining/Attracting Residents

Household Type	Median Household Income	Economic Impact per 10 Households	
		Jobs	Labor Income
Married professionals with children	$85,977	7	$256,000
Retiree couples	$55,363	4	$168,000
Single professionals	$48,704	4	$149,000

Sources: (U.S. Census Bureau, 2015), IMPLAN model for Lewis and Clark County, and Highland Economics analysis. All values have been adjusted for inflation from 2015 dollars to 2017 dollars using the Consumer Price Index.

Assuming 10 of each type of these households were to remain in or be attracted to the Helena are in part or in whole because of the facility, then area household income could be retained or increase by a total of $1.9 million. This income, when added to the overall County economy, would support approximately 15 jobs and over $572,000 in labor income. While it is uncertain whether or not the new sports complex would, in fact, help retain 30 such families, it is notable that the households in this example would only represent a small fraction of the facility's projected annual membership. The feasibility analysis by Ballard King estimated that the facility would receive an estimated 1,576 annual members (Ballard King & Associates Ltd, 2017). The households in the above-mentioned analysis would represent only two to five percent of the facility's annual membership, depending on how many people in the household held memberships or passes. While it is not known how many households the facility would attract or retain, this analysis provides a reasonable illustration of the potential economic impact of the facility due to retention/attraction of residents.

3 HEALTH BENEFITS OF A SPORTS COMPLEX

This section summarizes how availability of a sports complex may enhance public health in Lewis and Clark County, and how such an improvement, in turn, benefits quality of life, reduces health care costs, and enhances employee productivity.

Health is a critical component of people's quality of life. Facilities that promote and provide opportunities to be physically active can make a significant difference in the public health of the community. We begin this section by comparing the health statistics of Lewis and Clark County to those of the other counties in Montana, with a focus on the aspects of health connected with physical activity. These metrics include:

- Rates of obesity and overweight,
- Diabetes,
- Heart disease, and
- Physical activity outside of employment.

We present health statistics at the county level as this is the smallest unit that is studied uniformly and for which data are available. We believe that county-level data are a good measure of health conditions for the service area of the proposed facility, as the service area of the proposed sports complex extends beyond Helena and comprises a majority of the county's residents.

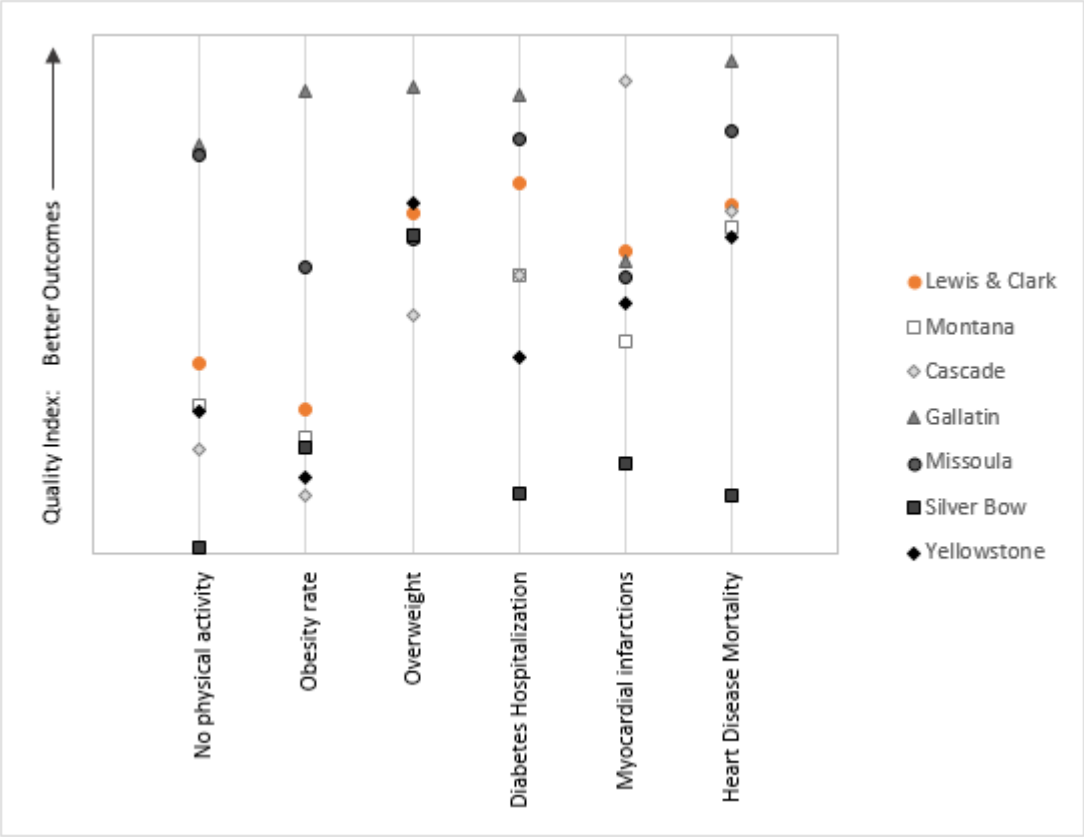
The most recent health statistics for Lewis and Clark County are provided in **Table 3-1,** as compiled by the Montana Department of Public Health and Human Services (DPHHS) in its Community Health Assessments. For easier comparison, **Figure 3-1** ranks the health metrics of each area, with more favorable values being placed near the top of the chart.

Table 3-1: Comparative Health Metrics from Montana DPHSS

Health Metric	Lewis & Clark	Cascade	Gallatin	Missoula	Silver Bow	Yellowstone	Montana
Rate of no physical activity outside work	19.5%	22.0%	13.2%	13.5%	24.8%	20.9%	20.7%
Obesity rate	20.8%	23.3%	11.6%	16.7%	21.9%	22.8%	21.6%
Overweight rate	36.9%	40.8%	32.0%	37.9%	37.7%	36.5%	37.8%
Diabetes hospitalization rate	94.3	115.6	73.7	84.3	165.9	134.3	115.4
Heart attack hospitalization rate	133.2	147.3	107.0	135.0	137.2	166.0	141.3
Heart disease mortality rate	184.4	188.2	96.3	139.1	363.5	204.6	198.0

Source: (Montana Department of Public Health and Human Services, 2011). Percent values represent the proportion of adults in the total population. Non-percent values represent the number of adults per 100,000 population.

Figure 3-2: Comparison of Health Metrics from Montana DPHSS



As the above figure shows, Lewis and Clark County often experiences better health outcomes than the counties of Cascade, Silver Bow and Yellowstone, as well as the state as whole. This is true for obesity, heart attack hospitalization, heart disease mortality, and physical inactivity, and often true for overweight. However, health outcomes in Gallatin and Missoula counties demonstrate that Lewis and Clark still has substantial room for improvement in its health outcomes. For most metrics, the County needs to reduce prevalence of these ailments by 20 to 30 percent before it reaches the health levels seen in Gallatin and Missoula, and for some conditions such as obesity and heart disease mortality, by almost half.

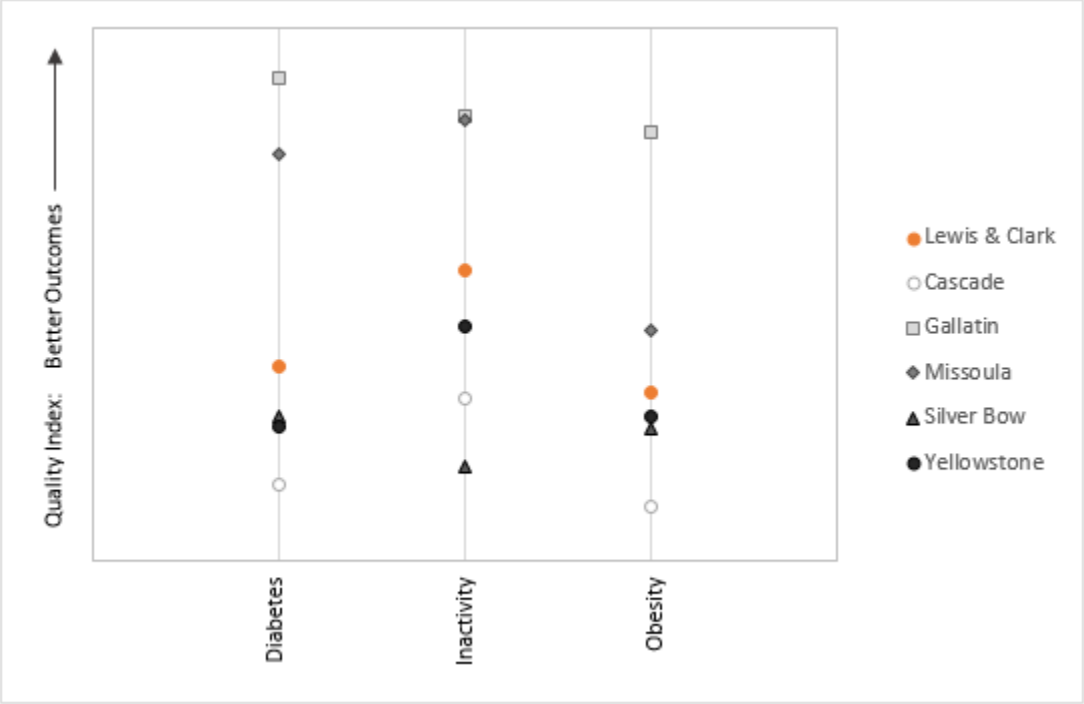
Table 3-3: Comparative Health Metrics from the CDC

Health Metric	Lewis & Clark	Cascade	Gallatin	Missoula	Silver Bow	Yellowstone
Diabetes	7.7%	9.1%	4.3%	5.2%	8.3%	8.4%
Inactivity	20.2%	24.5%	15.0%	15.1%	26.8%	22.1%
Obesity	24.3%	28.2%	15.5%	22.2%	25.5%	25.1%

Source: (Centers for Disease Control and Prevention, 2016). Figures represent the age-adjusted percentage of the adult population.

More recent health statistics from the Centers for Disease Control and Prevention (CDC) show much the same picture, displayed in **Table 3-2** above and **Figure 3-2** below. In the included metrics, study area residents fare slightly better than Cascade, Silver Bow, and Yellowstone, but do not experience the activity-related health outcomes seen by Gallatin and Missoula.

Figure 3-4: Comparison of Health Metrics from the CDC



The U.S. Census estimates the current population of Lewis and Clark County to be just over 65,000, with 78 percent over the age of 18 (about 51,000 people) (U.S. Census Bureau, 2015). According to the statistics in the table above, almost 4,000 of these adults have diabetes, over 10,000 are inactive, and over 12,000 are obese. If Lewis and Clark County experienced the health standards of Gallatin County, 1,700 fewer residents would have diabetes, 2,600 more people would be active, and 4,400 would no longer be obese. This illustrates the potential for Lewis and Clark County to improve its activity-related health outcomes. A new multi-sport complex in Helena could help facilitate this improvement by increasing the availability of facilities and offering programing that encourages residents to be active.

Research has identified a strong connection between the availability and proximity of sports recreation facilities and improved health outcomes, especially for children. In one study, it was found that children who live close to recreational programs are less likely to experience increases in Body Mass Index (BMI), which is a standard measure of being overweight (Wolch, et al., 2011). A 2006 literature review indicated that children's participation in physical activity is positively associated with publicly-provided recreational infrastructure (Davison & Lawson, 2006). Another study that same year found that larger and more accessible parks and recreation areas were associated with greater physical activity in young children (Roemmich, et al., 2006). A more recent study found a link between children's weight and the presence of a recreation area, showing that the presence of recreation facilities decreases the likelihood of a child being obese (Fan & Jin, 2016). A sports facility that encourages children to be physically active

could be especially helpful in Helena, where childhood obesity is currently a concern (Beck, Cossitt, & Kohley, 2013).

The connection between facility availability and physical activity exists not just with children but also with adults. A study of rural Midwestern adults found that the presence and proximity of recreation centers significantly increased the odds of engaging in regular physical activity (Deshpande, Baker, Lovegreen, & Brownson, 2005). A study of adults across the U.S. found that access to an indoor gym was significantly associated with meeting the recommended level of physical activity (Brownson, Baker, Housemann, Brennan, & Bacak, 2001). Older adults benefit from the presence of a nearby recreation facility, as well. A study of adults 50 years and older found that swimming pools were one of several facilities significantly related to higher physical activity (Chad, et al., 2005). A study of adults over 60 years found that access to a recreation center was associated with greater physical activity (Booth, Owen, Bauman, Clavisi, & Leslie, 2000).

It should be noted that the positive association between facility availability and health outcomes, while common, may not ubiquitous. Some studies have found that the relationship is not statistically significant (Foster, Hillsdon, & Thorogood, 2004); (King, et al., 2003). Others have showed no association between the proximity of a fitness facility and physical activity, which may imply that proximity may not matter as much as access (Hoehner, Ramirez, Elliott, Handy, & Brownson, 2005).

A Helena sports facility that encourages more residents to be physically active and lose weight has the potential to save users money on health care. Studies have consistently shown that obese persons have greater health problems and higher health care expenditures than normal weight persons (Carlson, Fulton, Pratt, Yang, & Adams, 2015). One study found particular cost savings associated with ambulatory care and prescription drug expenditures (Bell, Zimmerman, Arterburn, & Maciejewski, 2011). Another study found that the annual health care costs of the obese individuals tend to be over 40 percent higher than people of normal weight (Finkelstein, Trogdon, Cohen, & Dietz, 2009).

Inactivity itself carries significant health care costs. A recent study measured how much more money inactive and insufficiently active adults paid for health care versus adults that were sufficiently active.[3] The researchers found that inactive adults paid roughly $1,400 to $1,500 per year more in health care costs than sufficiently active adults, and insufficiently active adults paid $600 to $750 dollars more annually (Carlson, Fulton, Pratt, Yang, & Adams, 2015).[4] As an illustrative example, if a new sports/recreation complex in Helena resulted in 10 currently inactive adults and 10 insufficiently active adults becoming sufficiently active (representing roughly one percent of the facility's projected annual membership), their total healthcare savings would total over $20,000 per year. This effect would be especially profound for children whose use of the facility may help them develop life-long habits that help them to live an active lifestyle throughout adulthood. One such child living to the age of 80 could see healthcare savings of $86,000 to $97,000 over their lifetime.

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[3] The study defined sufficiently active as 150 minutes per week of moderate-intensity equivalent physical activity. Inactive is defined as no moderate-intensity equivalent physical activity that lasted at least 10 minutes. Insufficiently active is defined as some moderate-intensity equivalent physical activity but less than 150 minutes per week.

[4] Values have been adjusted from 2012 dollars to 2017 dollars using the Consumer Price Index.

Local employers could also see a benefit from improved health outcomes. Many employers are unaware of the indirect costs caused by poor health, which include absenteeism, disability, and presenteeism, which is on-the-job productivity losses (Centers for Disease Control and Prevention, 2016). However, research suggests that these costs are significant. The costs of obesity at a firm of 1,000 employees has been estimated to be $335,000 per year (Finkelstein & Brown, Why Does the Private Sector Underinvest in Obesity Prevention and Treatment, 2006).[5] A study of more than 10,000 U.S. employees across multiple professions found that absenteeism and presenteeism costs are $243 per year higher for an overweight employee and $634 per year higher for an obese employee (Goetzel, et al., 2010).[6] If a new sports/recreation complex in Helena could encourage local workers to exercise and improve their health, local employers would benefit from greater workplace attendance and higher worker productivity. In addition to attracting and retaining residents, this is another way the proposed facility could indirectly benefit the local economy.

[5] Values have been adjusted for inflation from 2006 dollars to 2017 dollars using the Consumer Price Index.

[6] Values have been adjusted for inflation from 2006 dollars to 2017 dollars using the Consumer Price Index.

4 ECONOMIC IMPACTS OF TOURISM

As was recognized by local residents during the earlier Ballard King study, a new sports/recreation complex has the potential to boost the area's economy by hosting athletic tournaments that attract spending from out-of-town visitors. In this section, we estimate the size of these economic impacts to Lewis and Clark County. In brief, our analysis involved projecting the number of overnight visitors that will attend sports tournaments at the new complex, anticipating their general spending pattern, and estimating how that spending will ripple out through the area's economy. Even under generally conservative assumptions, the results indicate that visitor spending associated with hosting tournaments could support approximately 20 jobs and $488,000 annually in labor income. This level of labor income exceeds the annual budget shortfall for the proposed facility identified in the facility feasibility study of roughly $103,000 to $335,000 (Ballard King & Associates Ltd, 2017).[7] Thus, at the community level, community financial support for the facility to make up for operating losses would likely be more than recouped in total increased community income.

4.1 TOTAL OVERNIGHT VISITATION

In this analysis, we only consider the economic impacts coming from tournament attendees (participants and spectators) who reside outside the County and stay in overnight lodging for tournaments. Visitors who attend a tournament as a day trip, and those who lodge with family or friends, are not included in the estimates. Because these visitors may also spend money in the area that would likely not otherwise have been spent (e.g. buying food, fuel, retail items, etc), our estimates represent just a portion of the potential impact of tournaments resulting from the sports complex. Aside from tournaments, the facility may also to bring in out-of-area visitors for single game match-ups, classes, and general use of the facility, which would also increase spending in the area. For these reasons, we consider our estimates to be conservative, with the true economic impact of non-resident visitors being larger.

Our analysis draws from and maintains consistency with the complex's previous feasibility study and economic impact analysis by Ballard King & Associates. Their analysis provided the projected type and number of annual tournaments expected to be hosted at the proposed sports complex, and the number of teams that would participate in the tournaments. An exception is the number of teams participating in swim meets, which we estimated through a website that tracks swim meets throughout the State of Montana (Lee, 2017). The tournament assumptions are outlined in **Table 4-1**.

To project the total number of visitor-days per year, we made a number of assumptions regarding visitor habits. First, we assume that roughly one-third of teams attending tournaments will be from outside the County and will stay in overnight lodging along with their accompanying family, friends, and coaching staff (Ballard, 2017). The number of players per team were estimated based on interviews and diverse sources on sports teams. Each youth team is assumed to bring one coach, while adult teams are assumed to have a player that also serves as the coach or team manager. We assume that each youth competitor will be accompanied by an average of two spectators, and for every two adult competitors, one would be accompanied by one spectator (0.5 spectators per adult competitor). Furthermore, we

[7] The Ballard King analysis projected annual net revenues for the facility, which varied depending on the facilities and accommodations included in the proposed sports/recreational complex.

assume that tournaments will last an average of two days, based on input from Ballard King & Associates. When combined, these assumptions lead to the total visitor-days in the last column of **Table 4-1.**

Table 4-1: Estimated Overnight Visitors for Sport Tournaments

Sport	Group	Total Teams	Out-of-Town Teams	Players per Team	Tournaments per Year	Total Visitor-Days per Year
Basketball	Adult	16	5	12	4	720
Volleyball	Adult	16	5	10	4	600
Indoor Soccer	Adult	16	5	10	4	600
Indoor Flag Football	Adult	16	5	10	1	150
Basketball	Youth	16	5	12	5	1,850
Volleyball	Youth	16	5	12	5	1,850
Indoor Soccer	Youth	16	5	10	5	1,550
Indoor Flag Football	Youth	16	5	10	1	310
Swimming	School	14	5	15	4	1,840
Swimming	Lions Team	14	5	15	6	2,760

Sources: (Ballard King & Associates Ltd, 2017) and Highland Economics analysis.

4.2 Total Visitor Spending

Visitors attending adult tournaments are likely to have different spending patterns than those at youth tournaments. For that reason, we use distinct spending profiles for these two groups. The spending profiles used in this analysis are based on two studies by the University of Montana's Institute for Tourism and Recreation Research. One surveyed out-of-town visitors who attended the 2015 Montana State High School Rodeo Finals in Kalispell; the other surveyed out-of-town visitors who attended the 2016 Spartan Race in Bigfork. These two studies are particularly useful because one attracts youth and families, while the other attracts adults only. In each study, survey respondents were asked to recall their spending on various categories, such lodging, restaurants, and gasoline.[8] The respondents also provided their travel group size and the number of nights they stayed in the area. From this data, we were able to derive the average spending per person per day for an out-of-town visitor at each of the two events. **Table 4-2** displays these estimates, and, when combined with the visitor-days outlined in the table above, the estimates provide the projected total spending in Lewis and Clark County that is expected to result from the tournaments.

[8] The studies surveys also included spending categories such as camping, auto rentals, and local transportation. These were omitted from this analysis because they would likely only apply to a small number of tournament visitors. However, the omissions further support the conservative nature of our estimates.

Table 4-2: Per-Person and Total Spending at Sports Tournaments

Category	Spending per Person per Day [1]		Total Spending		
	Youth	Adult	Youth	Adult	Total
Motel/Hotel/B&B	$39	$31	$396,200	$64,100	$460,400
Restaurant/Bar	$19	$14	$193,000	$29,000	$222,000
Groceries/snacks	$11	$6	$111,800	$12,400	$124,200
Gasoline/diesel	$12	$7	$121,900	$14,500	$136,400
Retail Goods	$24	$12	$243,800	$24,800	$268,700
Entertainment/Recreation	$13	$10	$132,100	$20,700	$152,800
Total	$118	$80	$1,198,900	$165,600	$1,364,500

1/ Estimates were derived from (Schultz, 2015) and (Shultz, 2016). Mean expenditures per group were converted into average spending per person per day using the average group size and average number of nights stayed in the area. Estimates were adjusted for inflation to 2017 dollars using the Consumer Price Index.

As the first two columns of the table show, these studies indicated that per-person per-day spending is higher for youth sporting events than for adult sporting events. The total daily per-person spending values ($80 and $118) are reasonable in the context of other studies and observations by local experts, whose estimates range from $76 - $129 per person per day for similar events (Barkey & Morrill, 2016); (Crossroads Consulting Services, 2015); (Pentilla, 2016); (Sayler, 2012).[9]

Given the assumptions, a 16-team youth basketball tournament is expected to bring in 185 overnight visitors that generate roughly $44,000 in new visitor spending. An adult basketball tournament is expected to attract 90 overnight visitors that generate over $14,000. These projected values seem conservative when compared to local estimates of similar events. High school soccer tournaments hosted in Helena and Kalispell were estimated to generate between $190,000 and $207,000 when adjusted for team attendance (Friends of Fort Missoula Regional Park, 2012).[10]

The third and fourth columns of table illustrate how youth teams are expected to bring in substantially more tourism dollars than adult teams; over seven times as much, in total. This discrepancy arises primarily from the expectation that there would be twice as many youth tournaments, as well as the assumption that there are four times as many spectators per competitor for youth as compared to adults.

In total, the new sports complex is expected to increase out-of-county tourism spending by more than $1.36 million per year. **Table 4-3** outlines how spending totals in the table above are assigned to different economic sectors in the IMPLAN model. Hotels receive the highest proportion of total visitor spending ($460,000), followed by retail goods ($269,000) and restaurants ($222,000).

[9] Figures have been adjusted for inflation to 2017 using the Consumer Price Index.
[10] Figures have been adjusted for inflation to 2017 using the Consumer Price Index.

Table 4-3: Visitor Spending Impacts by Economic Sector

Spending Category	IMPLAN Economic Sector	Visitor Spending	Employment	Labor Income
Lodging	499 Hotels and motels, including casino hotels	$460,400	5.6	$132,100
Restaurants	501 Full-service restaurants	$111,000	2.8	$58,400
Restaurants	502 Limited-service restaurants	$111,000	1.6	$29,400
Groceries	400 Retail - Food and beverage stores	$124,200	0.7	$18,600
Gas	402 Retail - Gasoline stores	$136,400	0.1	$2,100
Retail Goods	405 Retail - General merchandise stores	$268,700	1.2	$38,200
Entertainment	496 Other amusement and recreation industries	$152,800	3.5	$47,600
N/A	Other sectors	$0	4.0	$161,600
Total	All sectors	$1,364,500	19.5	$488,000

Source: Highland Economics analysis and IMPLAN model for Lewis and Clark County

When a visitor spends money in the Helena area, benefits extend beyond the businesses frequented by the visitors. As economic activity increases at one business, it tends to buy more goods and services from other local businesses. For example, a restaurant that has more patrons will have to buy more food. If that food is locally-sourced, the local food suppliers benefit from the indirect effect of the spending, increasing its total economic effect in the local area. Furthermore, household income of restaurant owners and employees will go up, part of which will be spent at local establishments. This is called the induced effect. Together, the direct, indirect, and induced effects comprise the total economic impact of spending. Using an IMPLAN model, we translate the direct impacts listed in the last column of **Table 4-3** into total economic impacts; these total impacts, presented in terms of employment and labor income benefits, are presented in **Table 4-4**.

In total, we project that the $1.36 million in overnight visitor spending will support almost 20 local jobs and generate roughly $488,000 in income for local workers. **Table 4-4** displays the breakdown of total economic impacts according to the direct, indirect, and induced effects.

Table 4-4: Total Economic Impact of Overnight Visitors by Effect

Impact Type	Employment	Labor Income
Direct Effect	14.9	$312,124
Indirect Effect	2.3	$86,156
Induced Effect	2.4	$89,685
Total Effect	19.5	$487,966

Source: Highland Economics analysis and IMPLAN model for Lewis and Clark County

These results are particularly interesting when viewed in relation to the feasibility study produced by Ballard King & Associates. That study projected that the annual costs of the sports complex would exceed its annual revenues during the first five years of operation. The annual budget shortfall is estimated to range from roughly $103,000 to $335,000 (Ballard King & Associates Ltd, 2017). But when viewed as a net benefit or net cost to Lewis and Clark County, the benefits from tourism spending at tournaments are expected to outweigh the operating budget shortfall. Thus, at the community level,

community financial support for the facility to make up for operating losses would likely be more than recouped in total increased community income. As outlined above, we consider our estimates to be conservative for a number of reasons, implying that the annual benefits would likely be even higher.

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