



# FEASIBILITY STUDY

*Jefferson City, MO*



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In August of 2010 Ballard\*King & Associates was contacted by the Jefferson City Parks & Recreation Foundation about conducting a feasibility study for an indoor multi-purpose recreation facility for the Jefferson City Parks, Recreation & Forestry Department. Subsequently Ballard\*King & Associates provided the Foundation a scope of services and entered into a contract in September of 2010.

The purpose of the feasibility study was to take an objective third party look at the state of recreation programs and recreation facilities in Jefferson City and the surrounding areas and determine whether the Department could construct and operate an indoor recreation facility of their own. The scope of services that was developed to complete this study included:

1. Review of Existing Data
2. Market Analysis
3. Citizen Participation Plan (focus groups, stakeholder meetings, public meetings)
4. Statistically Valid Survey
5. Partnership Opportunity Assessment
6. Programming Statement
7. Operational Performance Indicator Analysis (OPiA)
8. Final Report

Based upon the scope of services and the information gathered the following comments can be made about the development of an indoor multi-purpose recreation facility in Jefferson City.

- Jefferson City Parks, Recreation & Forestry Department is a regional provider of recreation services. That is to say, their participants reach far beyond Jefferson City proper. Because of this, it was determined that the Primary Service Area which would be served by an indoor multi-purpose recreation facility would be a 15-mile radius of Jefferson City, or a population of approximately 97,000 individuals according to 2010 population estimates from ESRI.
- The population of both Jefferson City and the Primary Service Area is aging, however that is consistent with what is taking place in the State of Missouri and on a National level. While the population is aging, it is important to remember that the next generation of seniors, the Baby Boomer Generation, is staying active much longer than their predecessors. Subsequently there will continue to be an increased demand for parks and recreation services and facilities.
- While the median income levels of both Jefferson City and the Primary Service Area are below or at the National level, it can be said that the overall cost of living in those service areas is less than the National average. This is reflected in that the spending potential for Entertainment and Recreation Services is still significant.

- Within Jefferson City proper there are a significant number of alternative service providers for recreation facilities and services. However, when you examine that same list of providers applied to the population of the Primary Service Area it would indicate that there is still a substantial percentage of the market that is available. When the alternative service providers were engaged as to their thoughts and opinions on Jefferson City developing an indoor multi-purpose recreation facility, the overwhelming response was that they would be supportive as long as the facility did not have a significant focus on fitness.
- In addition to the significant number of alternative service providers there are over 35 gymnasium spaces in the Jefferson City service area that are rentable to outside groups. Those providers range from the various school districts to non-profit groups to churches. And while the sheer number of gymnasium spaces for Jefferson City and the surrounding area is quite high, it also should be noted that the bulk of those facilities are not ideal for the types of recreation programs and leagues that the Jefferson City Parks, Recreation & Forestry Department offers.
- The overwhelming want which was voiced by the various focus groups and stakeholders in the Jefferson City area is for indoor multi-purpose gymnasium space.
- When the citizens of Jefferson City were surveyed concerning an indoor multi-use recreation facility there were several significant pieces of information gained:
  - Currently 52% of respondents use indoor recreation facilities of some type.
  - Features that respondents would use the most in a new facility would be (top 4); indoor running/walking track, weight room/cardiovascular area, indoor aquatics/swim center, aerobics/fitness/dance space. Note: an indoor running/walking track is typically found around the basketball courts of a gymnasium floor or suspended around the perimeter of the gymnasium.
  - 47% of respondents said they would visit an indoor multi-purpose recreation facility at least once per week.
  - 61% of respondents felt that the construction of a new indoor multi-purpose recreation facility would have the greatest impact on making Jefferson City an attractive place to live, work and play.
  - 60% of respondents felt that development of a new indoor multi-purpose recreation facility was a medium to high priority for the community.
- In meeting with potential partners for an indoor multi-purpose recreation facility there were multiple groups that expressed an interest. A common theme amongst those groups was that none of them had capital dollars that they could bring to the construction of the facility. Another common theme was their willingness to support such a venture by the

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Jefferson City Parks, Recreation & Forestry Department. St. Mary's hospital was the most interested party of all groups that were engaged. Their interest level was in having dedicated space for rehabilitation services that they would lease from the Department. Again, they were not able to provide upfront construction dollars, but the revenue from leasing such a space would be significant in helping offset an operation deficit within the facility.

- Based on the information gathered and financial direction given by upper level city administration and the Director of the Jefferson City Parks, Recreation & Forestry Department, a phased facility development program was prescribed out of necessity. The facility program's initial phase is to fulfill the needs of the focus groups and the needs of the Department which is for indoor multi-purpose gymnasium space which can be used for a wide variety of activities. A future phase could add to that structure the wants expressed by the citizens in the survey: indoor walking/running track, indoor aquatic, fitness components, meeting rooms, etc.
- The operational realities of the first phase program are that there will be an operational subsidy that the Department will have to absorb in their current budget structure, work to minimize, or eliminate completely. With the components included in the first phase it is the opinion of Ballard\*King & Associates that the operation deficit can be minimized but it will be difficult to eliminate completely. The reason is that because of the other alternative service providers in the area there is a price point which it would be difficult for the Department to go beyond without losing market share.
- The operational realities of the future phase program are that there will be a much more significant operational subsidy for the facility in comparison to the first phase. Such an operational subsidy is not uncommon in municipally operated recreation facilities. Most communities in the State of Missouri offset construction and operational costs of such facilities with a dedicated ½ cent sales tax while retaining their park property tax funding as well. Jefferson City has already passed this dedicated ½ cent sales tax and the operational cost of the Department as a whole is required of this funding mechanism due to elimination of the park property tax and previous general fund operating subsidy. Therefore, to pursue the future phase, the Department would have to pursue multiple options:
  - Generate more revenue and more market share through recreation programs, rental of spaces and a membership to a facility.
  - Derive more dollars from the City and its capital improvement ½ cent sales tax.
  - Regain a portion of the property tax dollars that were once allocated to the Parks, Recreation & Forestry Department.
  - Generate more dollars from the ½ cent local parks sales tax.

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## **Market Conclusion:**

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

### *Opportunities*

- The Jefferson City Parks, Recreation & Forestry Department currently has 1 indoor facility in their inventory, Washington Park Ice Arena. They do not currently have a recreation facility that contains a gymnasium, walk/jog track, or fitness area.
- There is an acute need for more gym space in the area. The Department is highly dependent on the use of school gyms and other providers in the area which are not always available due to various functions, other renters and a fee required for use.
- There are no consistently available large, public, field house facilities that can be rented to support youth or adult sports tournaments and clinics in the immediate Jefferson City market area.
- Despite the presence of a significant number of other providers in the immediate market, the population base in the primary market is large enough to support another indoor recreation facility that has a different market focus.
- An indoor recreation center improves the quality of life in a community and often serves as an economic development engine.

### *Challenges*

- There are a significant number of existing fitness and recreation facilities in the immediate Jefferson City service area. Most of these facilities have a strong fitness orientation as well as other sports amenities. In addition the YMCA has a strong family focus.
- Funding, not only for development but also for the operation of an indoor recreation center will have to be clearly defined. It should be expected that the center will operate at a financial deficit every year.
- The Jefferson City Service Area population is older, with a lower median household income level. These demographic characteristics point to an older population that is not necessarily ideal for the support and use of an indoor public community recreation facility. However it is noted that the Baby Boomer generation is staying active much longer and will continue to look for recreation services.

It is the opinion of Ballard\*King & Associates that the Jefferson City Parks, Recreation & Forestry Department should pursue the first phase facility outlined in the program statement of this report. The ability to have control over a facility where the bulk of City programming efforts will take place will ensure those programs viability and future success. Such a facility will provide an incubator for the Department to look at new program opportunities in appropriate, controlled spaces. Additionally, a facility such as this will give the Department another avenue beyond the Washington Park Ice Arena and their two outdoor pools to engage the public.

The next step in pursuing said phase would be to engage an architect and have them provide the following services:

- Verification of square footage.
- Capital cost outlay.
- Total project cost.
- Assistance in determination of site selection.
- Schematic Design

It is also the opinion of Ballard\*King & Associates that the Jefferson City Parks, Recreation & Forestry Commission enter into the future phase of this project very cautiously. There would be a significant operational subsidy with such a facility and the ability for such a facility to break even in a pre-existing market with other provides would be difficult at best.



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## **Section I – Demographic Summary & Market Review**

Jefferson City Parks, Recreation & Forestry Department is exploring the concept of developing a indoor multi-use recreation center. The following market analysis looks at the demographic realities within Jefferson City and a larger Primary Service Area and compares those numbers to state and National numbers.

The following is a summary of the basic demographic characteristics of Jefferson City and the primary service area and a comparison with basic sports participation standards as produced by the National Sporting Goods Association 2009 Survey.

**Service Areas:** The focus of an indoor multi-use recreation center would be first and foremost to serve the residents of Jefferson City. Thus, the immediate service area for a potential facility will be Jefferson City proper. However, the Department generally sees consistent participation from individuals within a 15 mile radius. Therefore a 15-mile radius from the center of Jefferson City has been identified as a primary service area. The primary service area demographic data is what will be used to develop participation rates for a variety of potential activities in the facility.

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

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

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



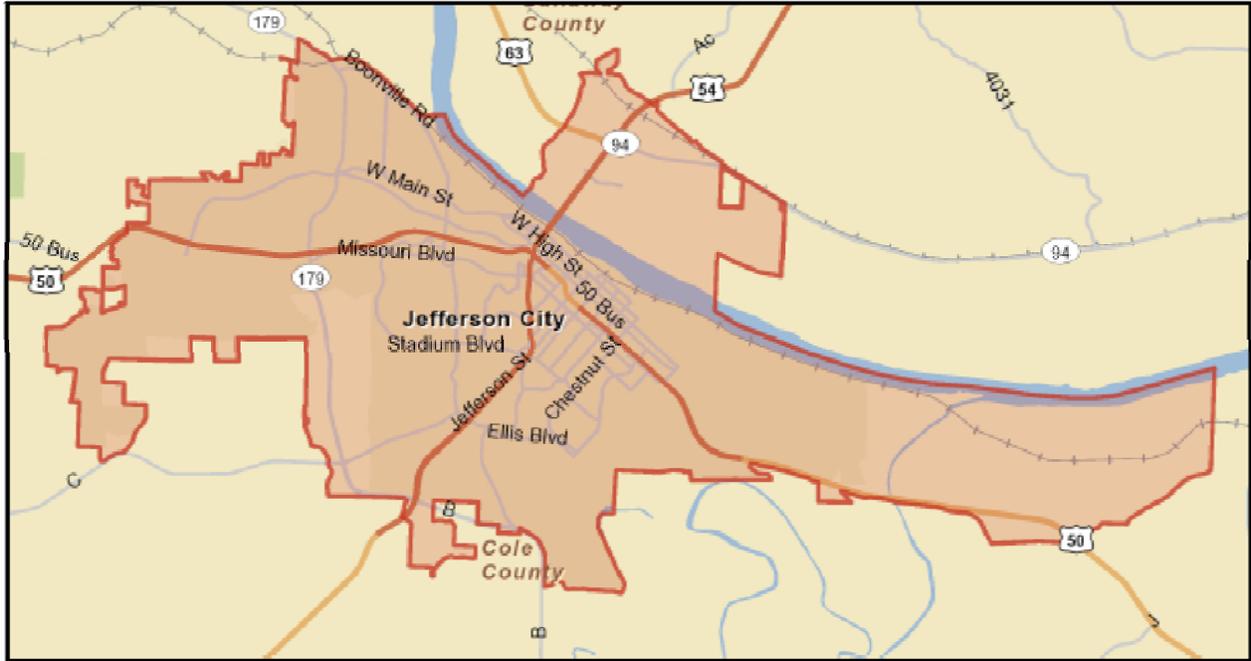
**Table A - Service Area Statistics & Comparison**

	Jefferson City <sup>1</sup>	Primary Service Area
<b>Population:</b>		
2000	39,636	89,437
2010	41,656	96,147
2015	42,385	99,412
<b>Households:</b>		
2000	15,794	33,752
2010	17,321	37,653
2015	17,763	39,210
<b>Families:</b>		
2000	9,203	23,065
2010	9,890	24,937
2015	9,950	25,599
<b>Average Household Size:</b>		
2000	2.21	2.47
2010	2.20	2.42
2015	2.19	2.41
<b>Ethnicity:</b>		
Hispanic	2.6%	2.1%
White	79.4%	87.3%
Black	15.3%	8.7%
American Indian	0.4%	0.4%
Asian	2.0%	1.2%
Pacific Islander	0.1%	0.03%
Other	1.0%	0.8%
Multiple	2.0%	1.6%
<b>Median Age:</b>		
2000	36.5	35.4
2010	37.6	37.2
2015	37.9	37.7
<b>Median Income:</b>		
2000	\$39,647	\$43,466
2010	\$51,865	\$54,506
2015	\$58,384	\$60,116
<b>Household Budget Expenditures Index:</b>		
Housing	91	90
Entertainment & Recreation	91	93

<sup>1</sup> It should be noted that these numbers are slightly different than what was presented through the recently completed School District study.



**Map A – Jefferson City**





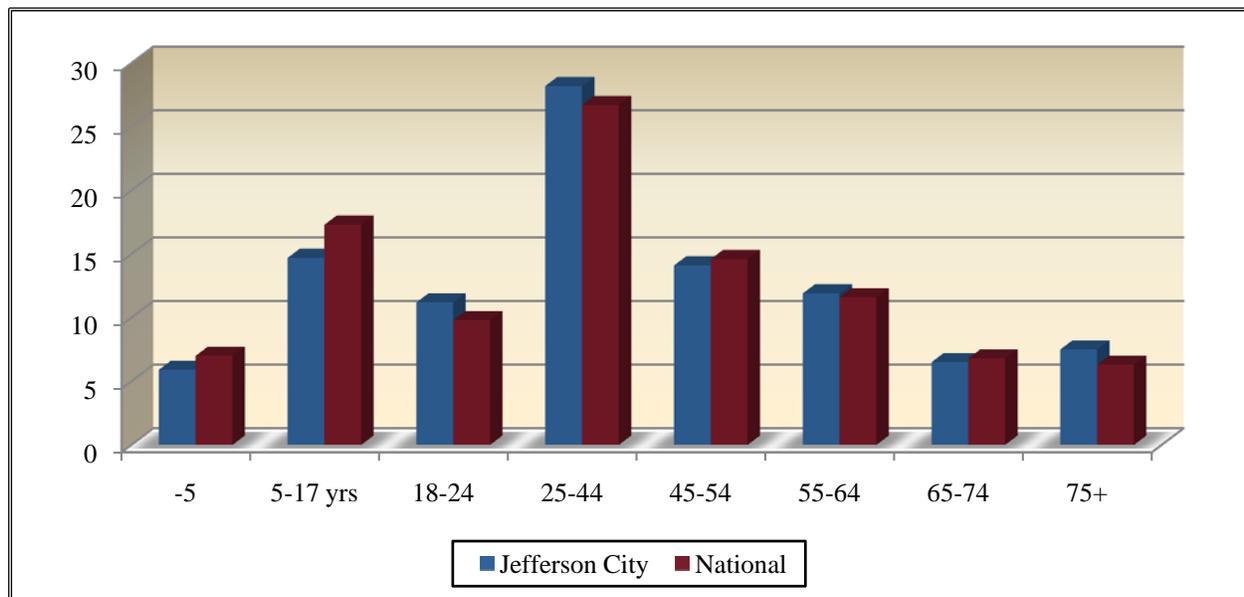
**Population Distribution by Age:** Utilizing census information for Jefferson City, the following comparisons are possible.

**Table B – 2010 Jefferson City Age Distribution**  
(ESRI estimates)

Ages	Population	% of Total	Nat. Population	Difference
-5	2,473	5.9%	7.0%	-1.1%
5-17	6,091	14.7%	17.3%	-2.6%
18-24	4,668	11.2%	9.8%	1.4%
25-44	11,778	28.2%	26.7%	1.5%
45-54	5,840	14.1%	14.6%	-0.5%
55-64	4,978	11.9%	11.6%	0.3%
65-74	2,703	6.5%	6.8%	-0.3%
75+	3,121	7.5%	6.3%	1.2%

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

**Chart A – 2010 Jefferson City Age Group Distribution**





## MARKET ANALYSIS

*Jefferson City, MO*



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The demographic makeup of Jefferson City, when compared to the characteristics of the national population, indicates that there are some differences with a larger population in the 18-24, 25-44, 55-64 and 75+ age groups and a smaller population in the -5, 5-17, 45-54 and 65-74 age groups. The largest positive variance is in the 25-44 age group with +1.5%, while the greatest negative variance is in the 5-17 age group with -2.6%.



**Population Distribution Comparison by Age:** Utilizing census information from Jefferson City, the following comparisons are possible.

**Table C – 2010 Jefferson City Population Estimates**  
(U.S. Census Information and ESRI)

Ages	2000 Population	2010 Population	2015 Population	Percent Change	Percent Change Nat'l
-5	2,314	2,473	2,482	7.3%	14.0%
5-17	5,964	6,091	6,284	5.4%	4.3%
18-24	4,379	4,668	4,603	5.1%	14.2%
25-44	12,720	11,778	11,969	-5.9%	0.0%
45-54	5,613	5,840	5,317	-5.3%	14.2%
55-64	3,103	4,978	5,217	68.1%	65.7%
65-74	2,646	2,703	3,539	33.7%	45.9%
75+	2,897	3,121	2,976	2.7%	19.5%

**Chart B – Jefferson City Population Growth**

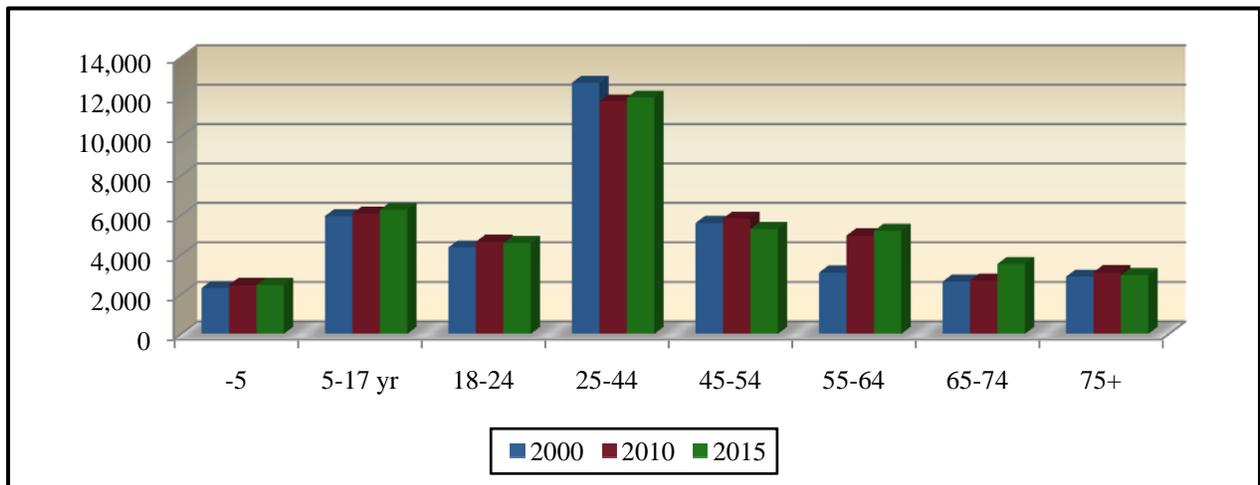


Table-C, illustrates the growth or decline in age group numbers from the 2000 census until the year 2015. It is projected that all of the age categories, except 25-44 and 45-54 will see an increase in population. It must be remembered that the population of the United States as a whole is aging and it is not unusual to find negative growth numbers in the younger age groups and net gains nearing 45% in the 45 plus age groupings in communities which are relatively stable in their population numbers.



Listed below is the distribution of the population by race and ethnicity for Jefferson City based on 2010 population estimates.

**Table D – Jefferson City Hispanic Population and Median Age**

(Source – U.S. Census Bureau and ESRI)

Ethnicity	Total Population	Median Age	% of Population	% of Missouri Population
Hispanic	1,085	26.0	2.6%	3.6%

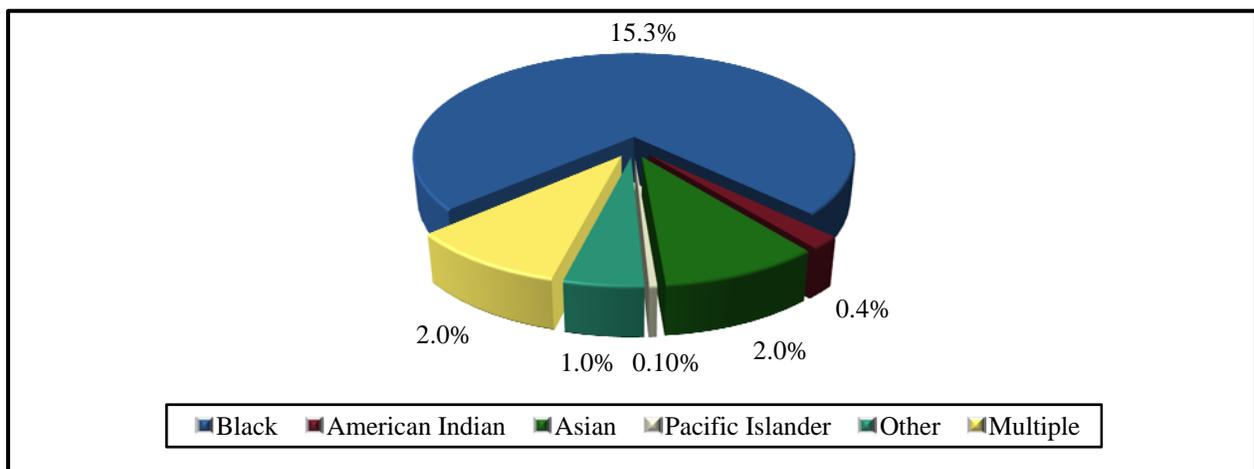
**Table E – Jefferson City Ethnic Population and Median Age**

(Source – U.S. Census Bureau and ESRI)

Ethnicity	Total Population	Median Age	% of Population	% of Missouri Population
White	33,078	41.6	79.4%	83.2%
Black	6,351	27.1	15.3%	11.5%
American Indian	162	38.6	0.4%	0.5%
Asian	804	28.9	2.0%	1.5%
Pacific Islander	22	23.3	0.1%	0.1%
Other	427	23.1	1.0%	1.3%
Multiple	812	24.9	2.0%	1.9%

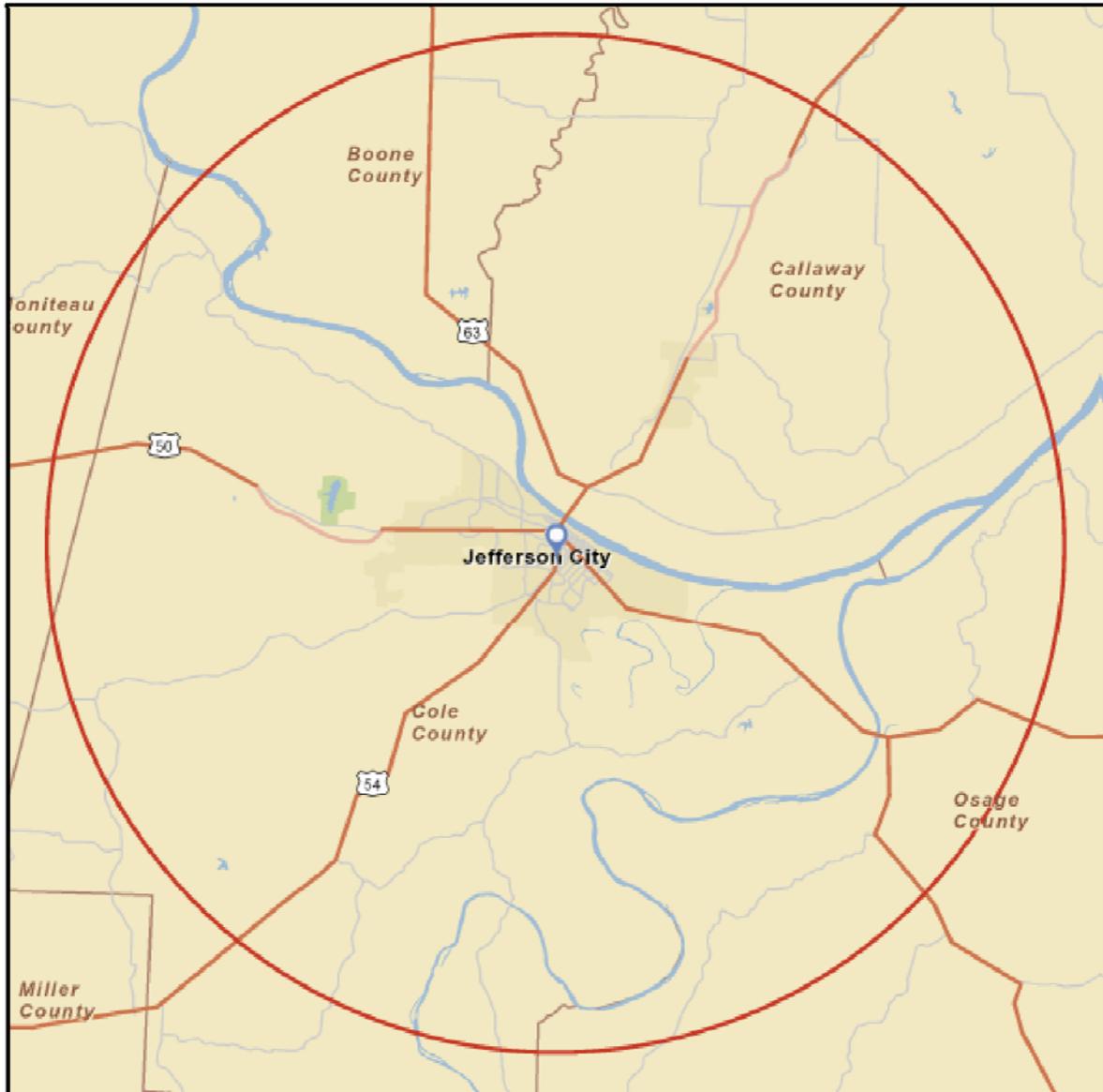
2010 Jefferson City Total Population: 41,656 Residents

**Chart C – Jefferson City Ethnic Population (Non-White)**





**Map B – Primary Service Area, 15-Mile Radius:**





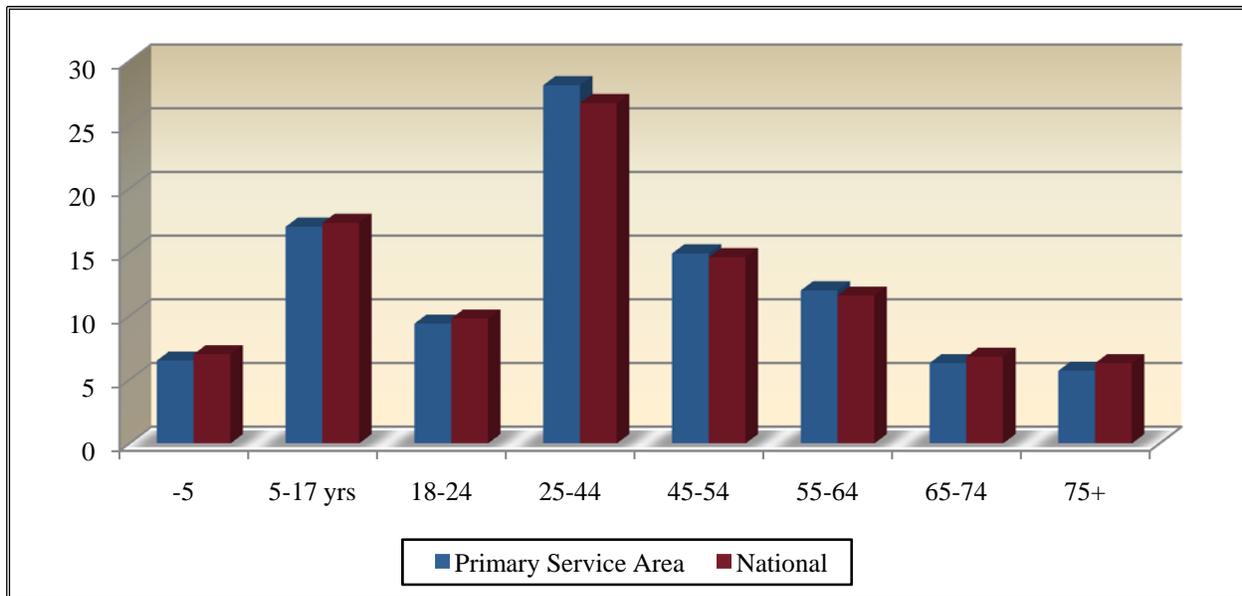
**Population Distribution by Age:** Utilizing census information for the Primary Service Area, the following comparisons are possible.

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

Ages	Population	% of Total	Nat. Population	Difference
-5	6,338	6.5%	7.0%	-0.5%
5-17	16,306	17.0%	17.3%	-0.3%
18-24	9,053	9.4%	9.8%	-0.4%
25-44	27,063	28.1%	26.7%	1.4%
45-54	14,315	14.9%	14.6%	0.3%
55-64	11,567	12.0%	11.6%	0.4%
65-74	6,091	6.3%	6.8%	-0.5%
75+	5,414	5.7%	6.3%	-0.6%

- Population:** 2010 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 D – 2010 Primary Service Area Age Group Distribution**





## MARKET ANALYSIS

*Jefferson City, MO*



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The demographic makeup of the Primary Service Area, when compared to the characteristics of the national population, indicates that there are some differences with a larger population in the 25-44, 45-54 and 55-64 age groups and a smaller population in the -5, 5-17, 18-24, 65-74 and 75+ age groups. The largest positive variance is in the 25-44 age group with +1.4%, while the greatest negative variance is in the 75+ age group with -0.6%.



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

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

Ages	2000 Population	2010 Population	2015 Population	Percent Change	Percent Change Nat'l
-5	5,999	6,338	6,379	6.3%	14.0%
5-17	16,346	16,306	17,066	4.4%	4.3%
18-24	8,353	9,053	9,088	8.8%	14.2%
25-44	28,712	27,063	27,439	-4.4%	0.0%
45-54	12,831	14,315	13,516	5.3%	14.2%
55-64	7,285	11,567	12,565	72.5%	65.7%
65-74	5,183	6,091	7,893	52.3%	45.9%
75+	4,728	5,414	5,466	15.6%	19.5%

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

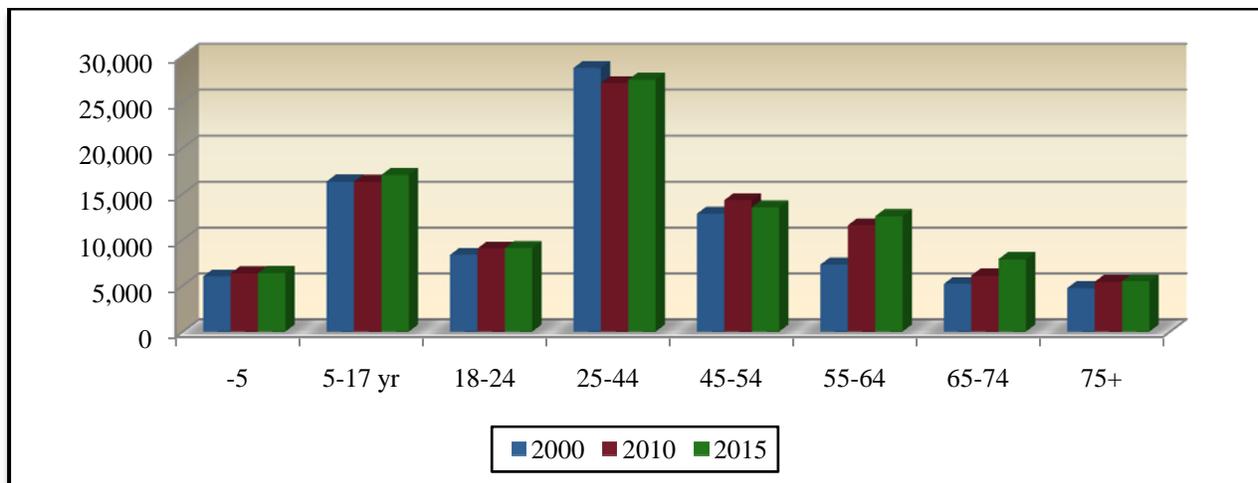


Table-G, illustrates the growth or decline in age group numbers from the 2000 census until the year 2015. It is projected that all of the age categories, except 25-44 will see an increase in population. It must be remembered that the population of the United States as a whole is aging and it is not unusual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



Listed below is the distribution of the population by race and ethnicity for the Primary Service Area based on 2010 population estimates.

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

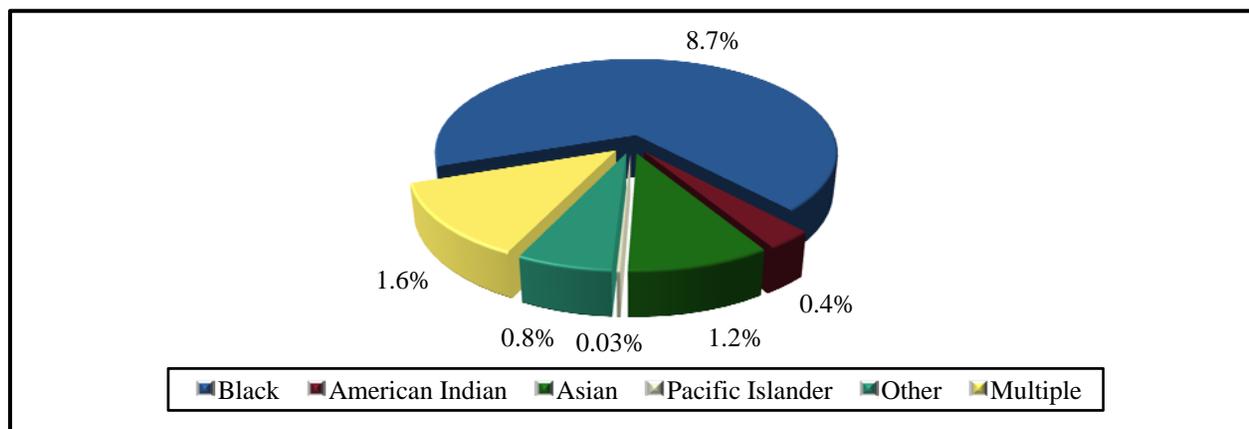
Ethnicity	Total Population	Median Age	% of Population	% of Missouri Population
Hispanic	1,972	25.9	2.1%	3.6%

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

Ethnicity	Total Population	Median Age	% of Population	% of Missouri Population
White	83,925	39.1	87.3%	83.2%
Black	8,349	28.2	8.7%	11.5%
American Indian	392	36.9	0.4%	0.5%
Asian	1,161	29.6	1.2%	1.5%
Pacific Islander	31	29.2	0.03%	0.1%
Other	767	21.9	0.8%	1.3%
Multiple	1,522	25.3	1.6%	1.9%

2010 Primary Service Area Total Population: 97,194 Residents

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



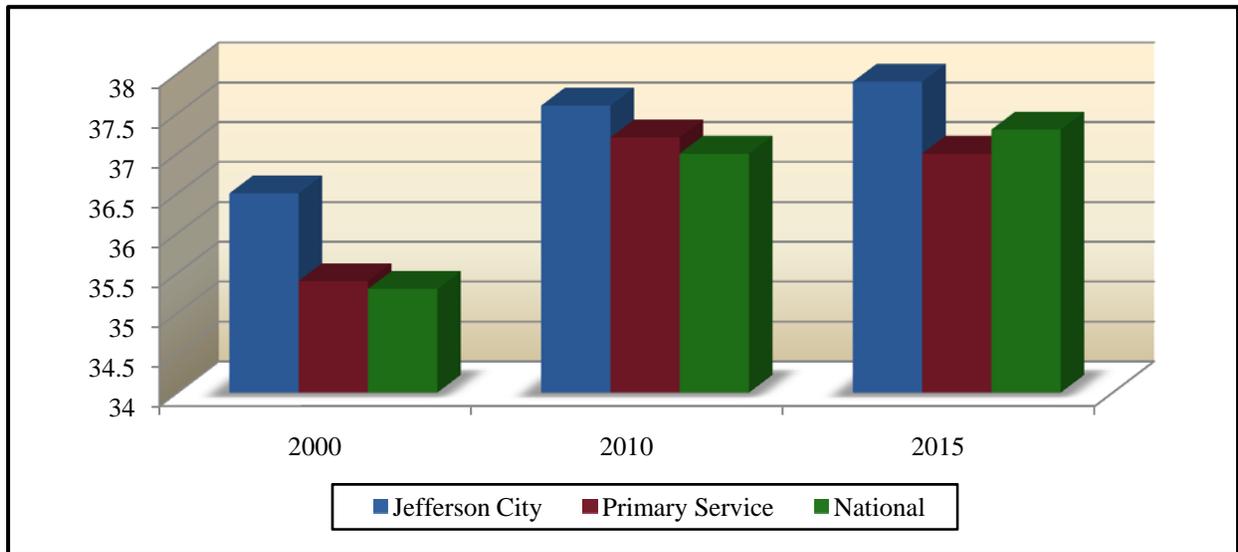


Next, the median age and household income levels are compared with the national number. Both of these factors are primary determinates of participation in recreation activities. The lower the median age, the higher the participation rates are for most activities. The level of participation also increases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

**Table J - Median Age:**

	2000 Census	2010 Estimate	2015 Projection
Jefferson City	36.5	37.6	37.9
Primary Service Area	35.4	37.2	37.7
Nationally	35.3	37.0	37.3

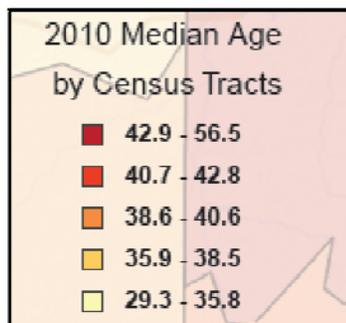
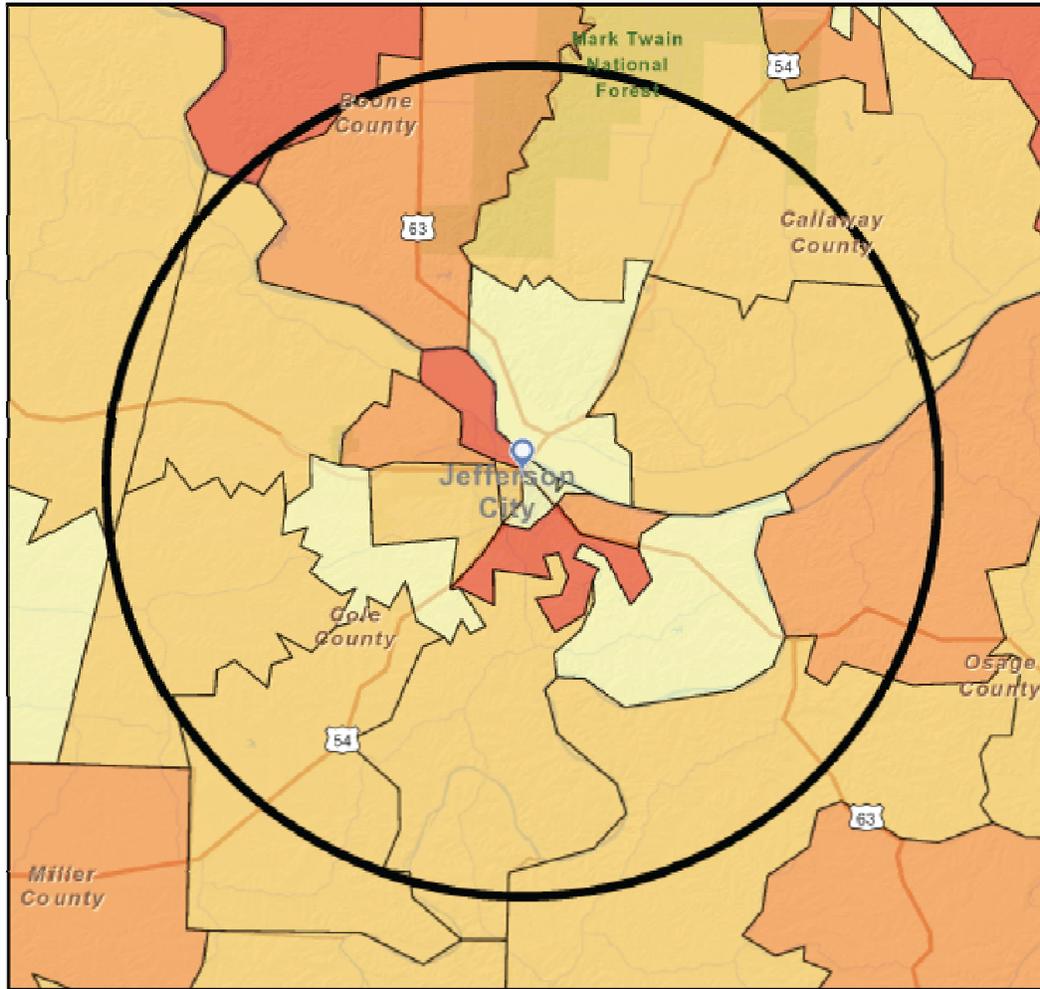
**Chart G – Median Age**



With the median age in Jefferson City and the Primary Service Area being above the National number it would indicate a slightly older population. It will be important to focus equally on facility components and programming efforts to meet the needs of all age groups. It is also important to remember that the Baby Boomer Generation is staying active longer than previous senior populations.



**Map C - Median Age by Census Tracts**

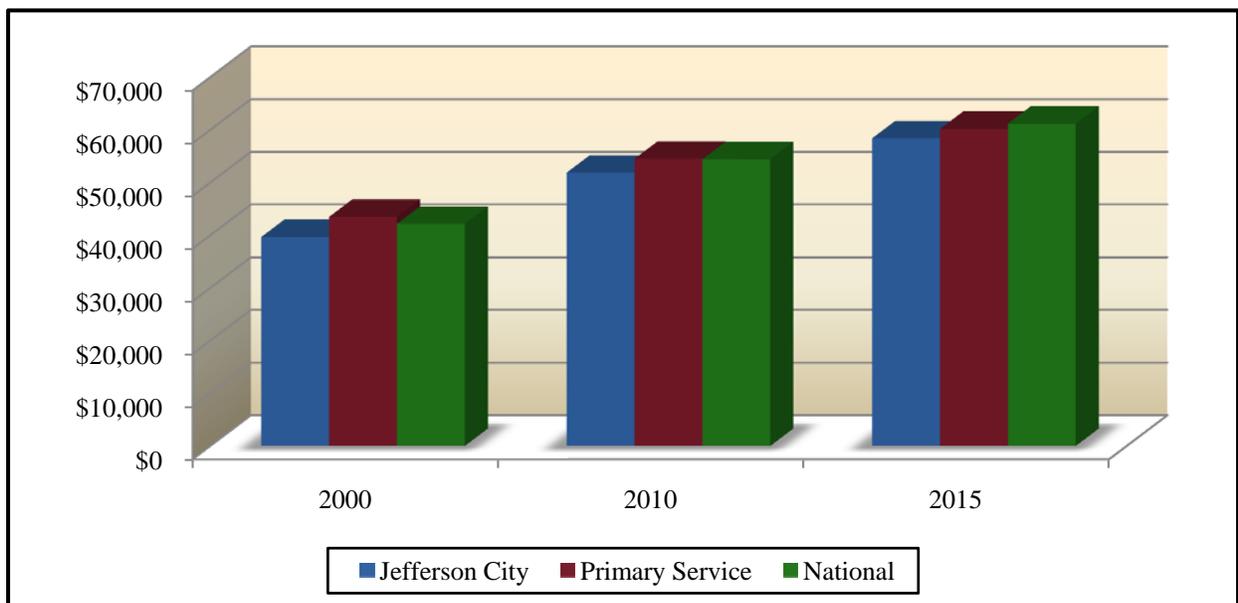




**Table K - Median Household Income:**

	2000 Census	2010 Estimate	2015 Projection
Jefferson City	\$39,647	\$51,865	\$58,384
Primary Service Area	\$43,466	\$54,506	\$60,166
Nationally	\$42,164	\$54,442	\$61,189

**Chart H – Median Household Income**



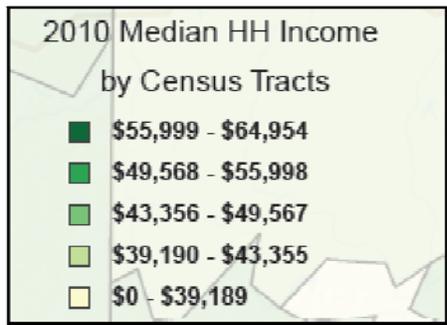
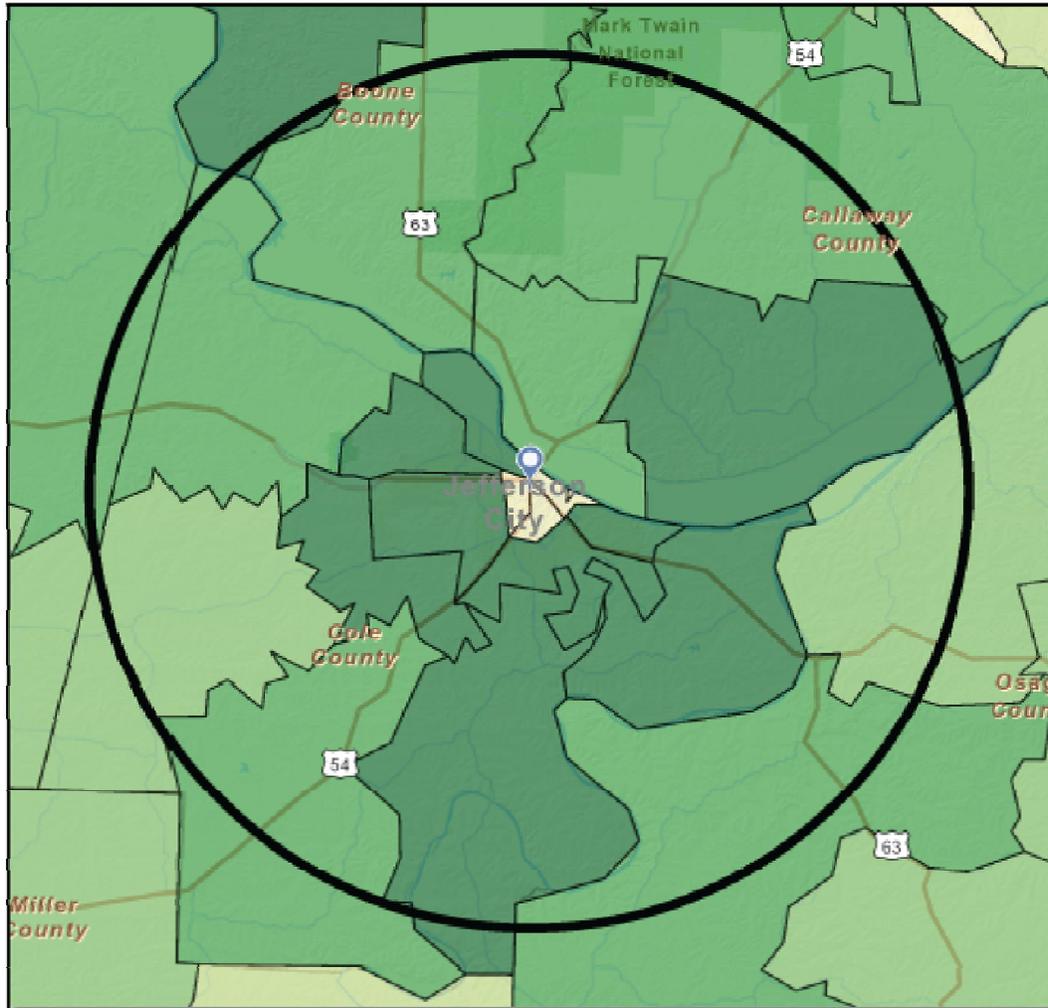
In Jefferson City the percentage of households with median income over \$50,000 per year is 52.0% compared to 54.5% on a national level. Furthermore, the percentage of the households in the City with median income less than \$25,000 per year is 21.0% compared to a level of 20.7% nationally.

In the Primary Service Area the percentage of households with median income over \$50,000 per year is 55.4% compared to 54.5% on a national level. Furthermore, the percentage of the households in the Primary Service Area with median income less than \$25,000 per year is 17.5% compared to a level of 20.7% nationally.

These statistics indicate there may be a slightly lower level of discretionary income within Jefferson City. However the Primary Service Area income is consistent with the National number. This information will need to be balanced with the overall cost of living for both service areas.



**Map D - Median Household Income by Census Tract**





In addition to investigating Median Age and Median Income, it is important to examine Household Budget Expenditures. In particular, examining housing information, shelter, utilities, fuel and public services along with entertainment & recreation can provide a snap shot into the cost of living and spending patterns in the service areas. The table below shows that information and compares Jefferson City, the Primary Service Area and the State of Missouri.

**Table L - Household Budget Expenditures<sup>2</sup>**

Jefferson City	SPI	Average Amount Spent	Percent
Housing	91	\$18,441.45	30.8%
<i>Shelter</i>	91	\$14,304.67	23.9%
<i>Utilities, Fuel, Public Service</i>	91	\$4,136.78	6.9%
Entertainment & Recreation	91	\$2,918.63	4.9%

Primary Service Area	SPI	Average Amount Spent	Percent
Housing	90	\$18,374.46	30.4%
<i>Shelter</i>	90	\$14,173.38	23.4%
<i>Utilities, Fuel, Public Service</i>	93	\$4,210.08	6.9%
Entertainment & Recreation	93	\$2,983.85	4.9%

State of Missouri	SPI	Average Amount Spent	Percent
Housing	87	\$17,648.08	29.8%
<i>Shelter</i>	85	\$13,425.43	22.7%
<i>Utilities, Fuel, Public Service</i>	93	\$4,222.66	7.1%
Entertainment & Recreation	91	\$2,948.31	5.0%

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

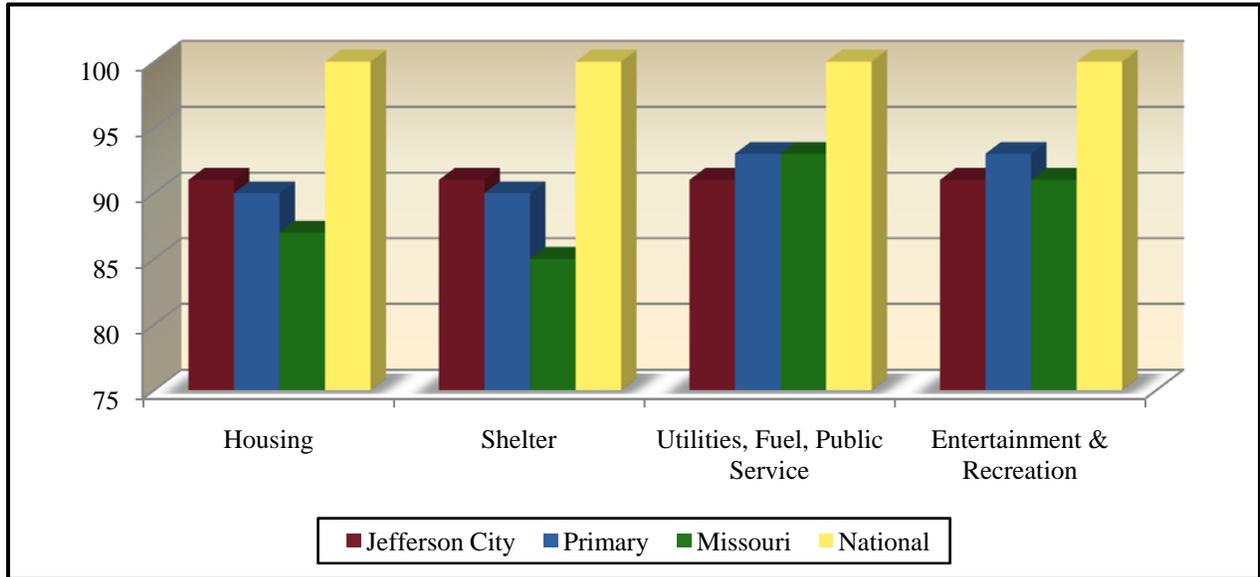
**Average Amount Spent:** The average amount spent per household.

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

<sup>2</sup> Consumer Spending data are derived from the 2004 and 2005 Consumer Expenditure Surveys, Bureau of Labor Statistics. ESRI forecasts for 2010 and 2015.



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



The Median Household Income in Jefferson City and the Primary Service Area, are below the National level, and the Household Budget Expenditures indicates that the cost of living in both service areas is slightly higher than the State of Missouri and lower than the National Spending Potential Index (SPI) Number of 100. Additionally, it would appear that the Spending Potential Index (SPI) for Entertainment & Recreation in the service areas is higher than the State of Missouri and lower than the National Spending Potential Index of 100.

This information is important to keep in mind when developing fee structures and looking at an appropriate cost recovery philosophy.



**Recreation Activities Participation**

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

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

**Table M – Participation Rates for Various Recreation Activities:**

Activity	Age	Income	Region	Nation	Average
Aerobic	12.3%	13.6%	10.7%	12.3%	12.2%
Baseball	4.2%	4.5%	4.6%	4.3%	4.4%
Basketball	8.8%	9.3%	8.9%	9.0%	9.0%
Exercise w/ Equipment	21.2%	22.3%	20.2%	21.2%	21.2%
Exercise Walking	34.9%	36.6%	36.9%	34.6%	35.7%
Running/Jogging	11.8%	10.6%	10.7%	11.9%	11.2%
Skateboarding	3.0%	2.8%	2.4%	3.1%	2.8%
Soccer	4.9%	4.6%	4.9%	5.0%	4.8%
Softball	4.3%	4.9%	6.3%	4.4%	5.0%
Swimming	18.5%	20.2%	14.8%	18.6%	18.0%
Tennis	4.0%	3.9%	3.7%	4.0%	3.9%
Volleyball	3.9%	3.7%	4.7%	4.0%	4.1%
Weight Lifting	12.7%	12.8%	12.5%	12.8%	12.7%
Workout @ Clubs	14.2%	15.1%	16.5%	14.2%	15.0%

- Age (median):** Participation based on individuals ages 7 & Up of the primary service area.
- Income:** Participation based on the 2010 estimated median household income in the primary service area.
- Region:** Participation based on regional statistics (West North Central).
- National:** Participation based on national statistics.
- Average:** Average of the four columns.

EXAMPLE: If we look at swimming and apply the average of 18% for the primary service area participation in Jefferson City to that service area population it would indicate that 17,894 individuals participate in swimming at least once over the course of the year.



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

The purpose of this chart is to illustrate either a growth or decline in the total estimated participation in various activities over time. As one can see below, the population for the primary service area is increasing, thus so is the participation in various recreation activities.

**Table N – Participation Rates**

Activity	Average	2000 Part.	2010 Part.	2015 Part.	Difference
Aerobic	12.2%	9,911	10,674	11,059	1,148
Baseball	4.4%	3,562	3,836	3,974	412
Basketball	9.0%	7,292	7,853	8,137	845
Exercise w/ Equipment	21.2%	17,210	18,534	19,203	1,993
Exercise Walking	35.7%	28,980	31,210	32,336	3,356
Running/Jogging	11.2%	9,117	9,818	10,172	1,056
Skateboarding	2.8%	2,287	2,463	2,552	265
Soccer	4.8%	3,932	4,234	4,387	455
Softball	5.0%	4,037	4,348	4,505	468
Swimming	18.0%	14,606	15,730	16,298	1,692
Tennis	3.9%	3,156	3,399	3,522	365
Volleyball	4.1%	3,296	3,549	3,677	382
Weight Lifting	12.7%	10,306	11,099	11,500	1,194
Workout @ Clubs	15.0%	12,169	13,105	13,578	1,409

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



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

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

	<b>Primary Service Area</b>	<b>National Participation</b>	<b>African American Participation</b>	<b>Hispanic Participation</b>
Aerobic	12.2%	12.3%	12.2%	10.0%
Baseball	4.4%	4.3%	5.0%	5.4%
Basketball	9.0%	9.0%	15.4%	12.6%
Exercise w/ Equipment	21.2%	21.2%	19.7%	20.0%
Exercise Walking	35.7%	34.6%	30.1%	33.8%
Running/Jogging	11.2%	11.9%	10.7%	13.5%
Skateboarding	2.8%	3.1%	2.5%	4.5%
Soccer	4.8%	5.0%	2.1%	9.3%
Softball	5.0%	4.4%	4.3%	5.5%
Swimming	18.0%	18.6%	9.8%	18.1%
Tennis	3.9%	4.0%	2.8%	4.9%
Volleyball	4.1%	4.0%	1.9%	7.1%
Weight Lifting	12.7%	12.8%	10.9%	15.6%
Workout @ Clubs	15.0%	14.2%	1.0%	3.1%

**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.

Based on the fact that there is not a significant Hispanic (2.1%) or Black (8.7%) population in the Primary Service Area those participation rates become irrelevant.



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

**Table P – Participation Correlation**

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

In interpreting this data the number at the top of each box refers to the percentage of the people that participate in the sport at the top of the page also participate in the sport to the left.

**Example:** 46.6% of people that participate in Swimming also participate in Exercise Walking. The number at the bottom of the box refers to the percentage of people that participate in the sport to the left also participate in the sport at the top of the page.

**Example:** 25.1% of people that Exercise Walk also Swim.



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

**Table Q – Sports Participation Summary**

Sport	Nat'l Rank <sup>3</sup>	Nat'l Participation (in millions)	Primary Service Rank	Primary Service % Participation
Exercise Walking	1	93.4	35.7%	1
Exercising w/ Equipment	2	57.2	21.2%	2
Swimming	5	50.2	18.0%	3
Work-Out at Club	7	38.3	15.0%	4
Weightlifting	9	34.5	12.7%	5
Aerobic Exercising	11	33.1	12.2%	6
Running/Jogging	12	32.2	11.2%	7
Basketball	15	24.4	9.0%	8
Soccer	21	13.6	4.8%	10
Softball	27	11.8	5.0%	9
Baseball	28	11.5	4.4%	11
Tennis	29	10.8	3.9%	13
Volleyball	30	10.7	4.1%	12
Skateboarding	33	8.4	2.8%	14

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

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

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

**Primary Service Rank:** The rank of the activity within the primary service area.

<sup>3</sup> This rank is based upon the 52 activities reported on by NSGA in their 2009 survey instrument.



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

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

**Table R – Missouri Participation Rates**

Sport	Missouri Participation (in thousands)	Age Group	Largest Number
Exercise Walking	2,244	35-44	35-44
Exercising w/ Equipment	1,135	25-34	25-34
Swimming	1,364	7-11	35-44
Work-Out at Club	854	25-34	25-34
Weightlifting	785	12-17	25-34
Aerobic Exercising	587	25-34	25-34
Running/Jogging	681	25-34	25-34
Basketball	492	12-17	12-17
Soccer	208	7-11	7-11
Softball	375	7-11	25-34
Baseball	390	7-11	7-11
Tennis	259	7-11	35-44
Volleyball	330	12-17	12-17
Skateboarding	132	7-11	12-17

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

**Age Group:** The age group in which the sport is most popular or in other words, where the highest percentage of the age group participates in the activity. (Example: The highest percent of an age group that participates in weight lifting is 12-17.) **This is a national statistic.**

**Largest Number:** The age group with the highest number of participants. Example: The greatest number of exercise walkers is in the 25-34 age group. (Note: This statistic is driven more by the sheer number of people in the age group than by the popularity of the sport in the age span.) **This is a national statistic.**



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

Missouri's population represents 1.9% of the population of the United States (based on 2010 estimates from ESRI).

**Table S – Missouri Participation Correlation**

<b>Sport</b>	<b>Participation Percentages</b>
<b>Softball</b>	<b>3.4%</b>
<b>Baseball</b>	<b>3.2%</b>
<b>Volleyball</b>	<b>3.1%</b>
<b>Exercising w/ Equipment</b>	<b>2.7%</b>
<b>Exercise Walking</b>	<b>2.4%</b>
<b>Tennis</b>	<b>2.4%</b>
<b>Weightlifting</b>	<b>2.3%</b>
<b>Work-Out at Club</b>	<b>2.2%</b>
<b>Running/Jogging</b>	<b>2.1%</b>
<b>Swimming</b>	<b>2.0%</b>
<b>Basketball</b>	<b>2.0%</b>
Aerobic Exercising	1.8%
Skateboarding	1.6%
Soccer	1.5%

**Note:** Sports participation percentages refer to the total percent of the national population that participates in a sport that comes from the State of Missouri's population. The fact that the rate of participation is equal to or great than the state percentage of National population in eleven activities indicates a relatively high rate of participation.



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

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

<b>Jefferson City</b>	<b>SPI</b>	<b>Average Spent</b>
Fees for Participant Sports	90	\$95.93
Fees for Recreational Lessons	87	\$118.47
Social, Recreation, Club Membership	90	\$147.50
Exercise Equipment/Game Tables	74	\$60.56
Other Sports Equipment	90	\$8.49

<b>Primary Service Area</b>	<b>SPI</b>	<b>Average Spent</b>
Fees for Participant Sports	92	\$97.67
Fees for Recreational Lessons	89	\$120.98
Social, Recreation, Club Membership	90	\$147.23
Exercise Equipment/Game Tables	77	\$63.23
Other Sports Equipment	93	\$8.84

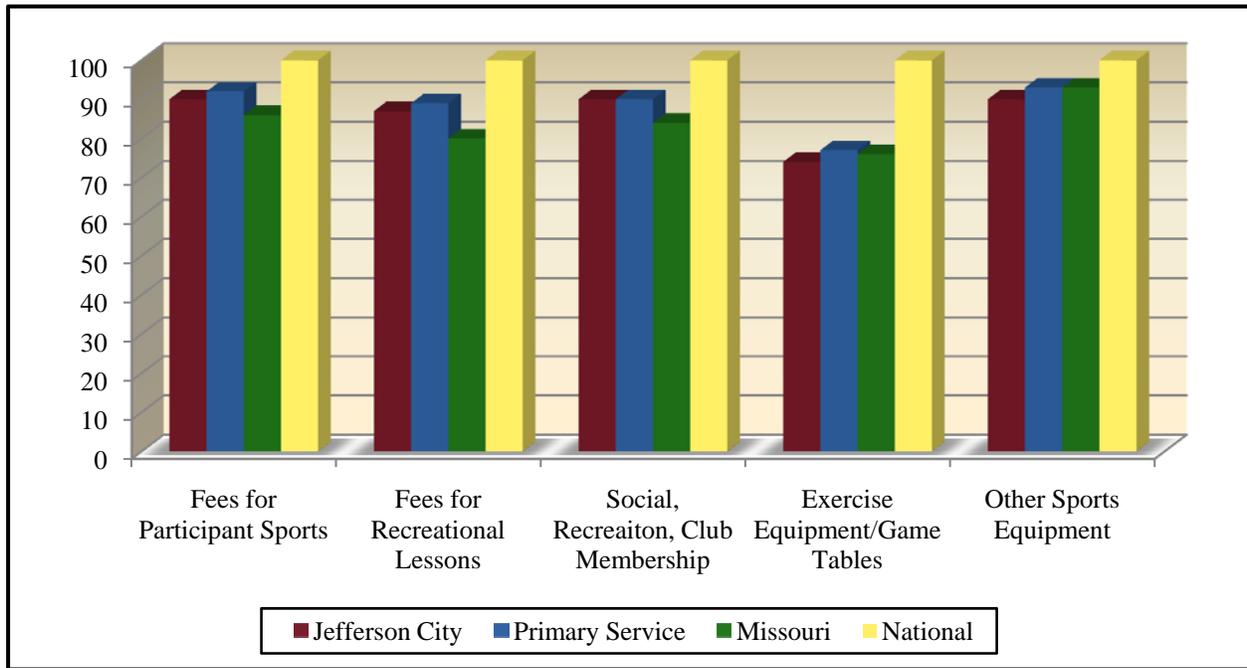
<b>State of Missouri</b>	<b>SPI</b>	<b>Average Spent</b>
Fees for Participant Sports	86	\$91.80
Fees for Recreational Lessons	80	\$109.03
Social, Recreation, Club Membership	84	\$137.12
Exercise Equipment/Game Tables	76	\$62.33
Other Sports Equipment	93	\$8.83

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

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



**Chart J – Recreation Spending Potential Index**

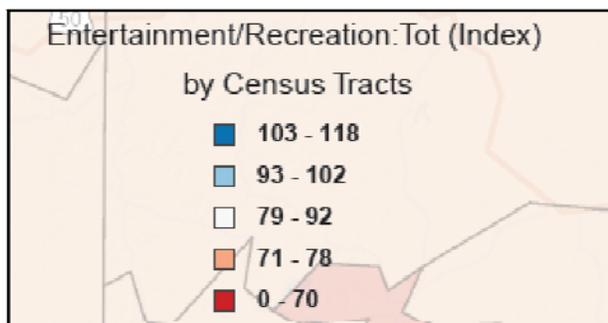
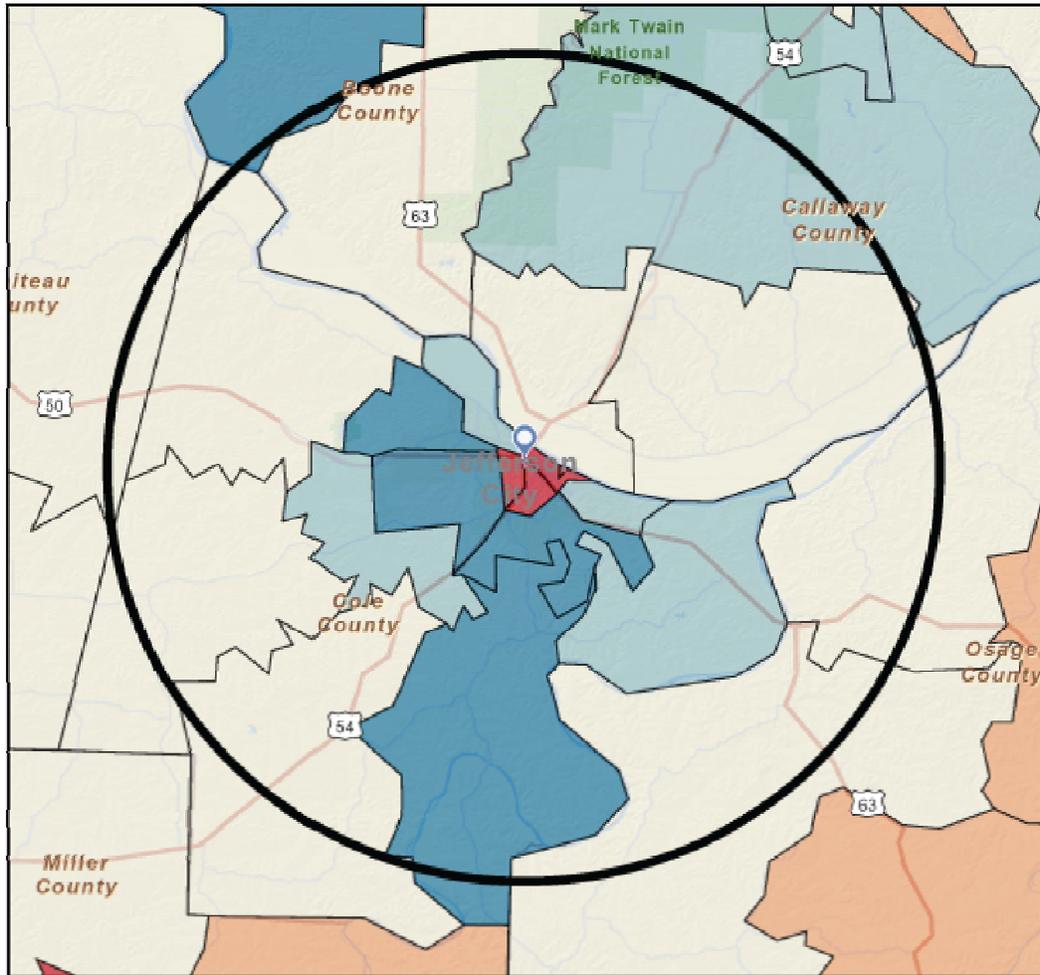


The SPI index indicates that in most of the areas the rate of spending is only slightly higher than the state average and is noticeably less than the National Spending Potential Index (SPI) of 100. This information is very important when determining a price point for activities and cost recovery philosophy.

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



**Map E – Entertainment/Recreation Total Dollars Spent by Census Tract**





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

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

There are many ways to measure a nation's cultural vitality. One way is to chart the public's involvement with arts events and other activities over time. The National Endowment of the Art's (NEA) Survey of Public Participation in the Arts remains the largest periodic study of arts participation in the United States, and it is conducted in partnership with the U.S. Census Bureau. The large number of survey respondents – similar in make-up to the total U.S. adult population – permits a statistical snapshot of American's engagement with the arts by frequency and activity type. The survey has taken place five times since 1982, allowing researchers to compare the trends not only for the total adult population, but also for demographic subgroups.<sup>4</sup>

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<sup>4</sup> National Endowment for the Arts, *Arts Participation 2008 Highlights from a National Survey*.



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

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

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

- Opera and jazz participation significantly decreased for the first time, with attendance rates falling below what they were in 1982.
- Classical music attendance continued to decline – at a 29% rate since 1982 – with the steepest drop occurring from 2002 to 2008
- Only musical plays saw no statistically significant change in attendance since 2000.

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

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

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

- After topping 26% in 1992 and 2002, the art museum attendance rate slipped to 23 percent in 2008 – comparable to the 1982 level.
- The proportion of the U.S. adults touring parks or historical buildings has diminished by one-third since 1982. *Note: While these numbers have decreased on a National level Jefferson City has seen the visits to their park double during this same period of time.*



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

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

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

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



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

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

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

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



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

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

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

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

While the overall participation in these types of activities is decreasing on a National level it must be remembered that public recreation facilities typically provide more than just active recreation. The programming that takes place in these facilities is intended to keep body and mind active. Therefore while the statistics do illustrate a downward trend there is still interest in the various pursuits listed and therefore this information should be taken into consideration when developing a facility program and the various types of individual programs that can take place in those spaces.



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

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

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

**2000 Participation:** The number of participants per year in the activity (in millions) in the United States.

**2009 Participation:** The number of participants per year in the activity (in millions) in the United States.

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



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

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

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

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

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

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



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

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

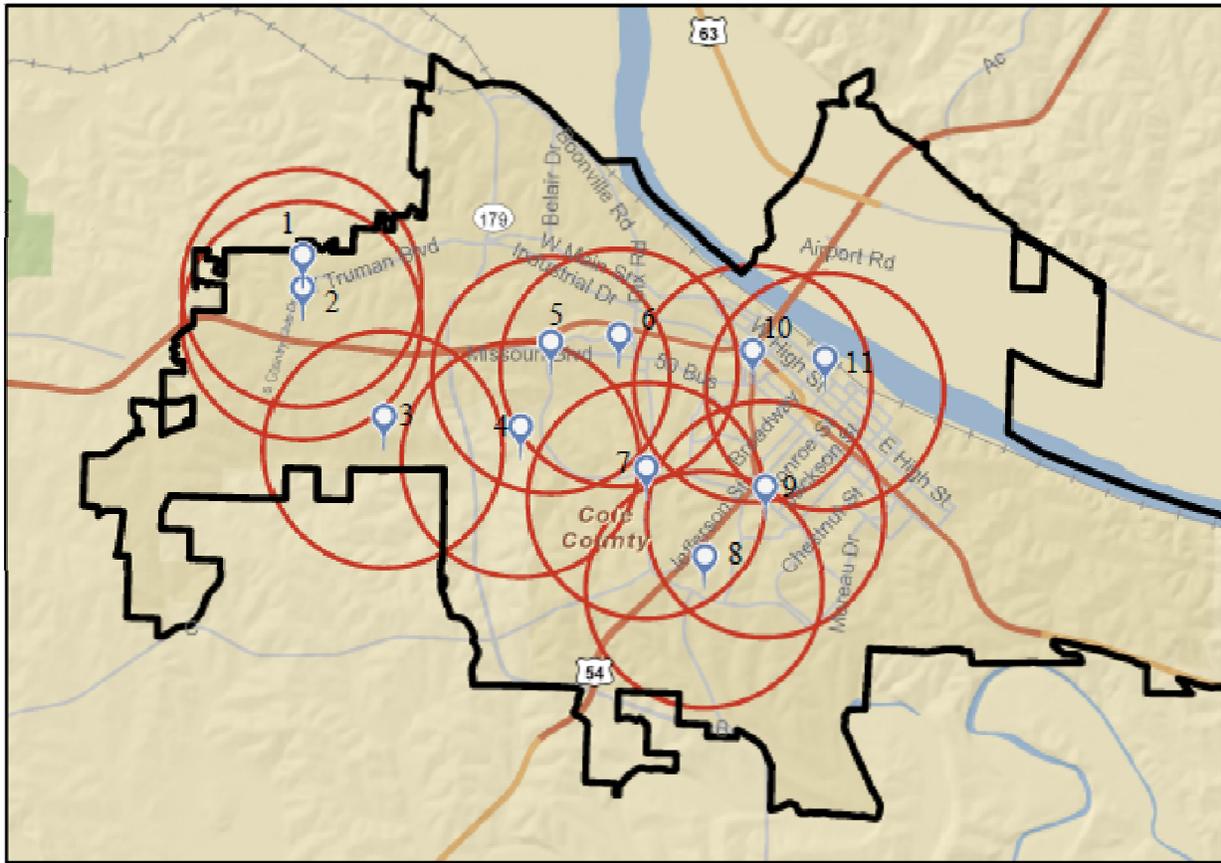
Another trend that is growing more popular in the aquatic's field is the development of a raised temperature therapy pool for rehabilitation programs. This has usually been done in association with a local health care organization or a physical therapy clinic. The medical organization either provides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

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



**Alternative Providers:** In addition to looking at the demographic realities of the service areas and overlaying that information with statistics from NSGA and NEA it is important to look at the other providers of similar services within the identified service areas. There are a significant number of facilities in Jefferson City proper given the total population. However, as you move further out to the 15-mile service area the number of alternative service provider decreases. The following is a brief review of each of the major providers in the public, non-profit and private sector.

**Map F – Alternative Service Providers, Non-Gymnasiums**



- |                           |  |
|---------------------------|--|
| 1. YMCA West              | 7. Capital Region Healthplex               |
| 2. Wilson's Total Fitness | 8. YMCA – Firley Center                    |
| 3. Anytime Fitness        | 9. YMCA – Knowles Center                   |
| 4. Capitol City Cheer     | 10. Heng's Gym                             |
| 5. Curves                 | 11. Wilson's Total Fitness Downtown Studio |
| 6. Got Skillz             |  |



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## 1. YMCA of Jefferson City

The YMCA of Jefferson City is a significant provider of recreation services to the community. In addition they have a substantial inventory of indoor facilities; Knowles Center, Firley Center and the West facility.

- The Knowles Center was the first YMCA facility in Jefferson City and has undergone at least one renovation where significant expansion was made to the weight and cardiovascular offerings. Additional amenities contained in the facility are gymnasium space, indoor running/jogging track, weight room, cardiovascular space, group exercise space, locker rooms and a significant gymnastics area that is leased by an outside vendor.
- The Firley Center was the second facility that was added to the YMCA inventory and used to be an indoor tennis facility that has been retrofitted to meet the YMCA mission.
- The West facility is the newest facility in the YMCA inventory. The facility contains the following amenities: group exercise room, storage, locker rooms, child watch service, large weight and cardiovascular area. This is Phase I of this site with the intention to add a gymnasium with elevated track along with an indoor aquatic component. It is the vision of the YMCA that the indoor aquatic component would be more leisure in nature as opposed to a traditional rectangle. This facility opened in 2010 and has a very new look and feel to it with easy to maintain finishes. There is an obvious focus on weights, cardiovascular training and group exercise which are membership drivers, but also areas which are lacking space in the other two YMCA locations.





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## 2. Wilson's Total Fitness & Wilson's Total Fitness Downtown Studio

Wilson's Total Fitness is a full-service private health club located in the Jefferson City Mall with a smaller studio space specifically for group exercise classes located downtown. The facility located at the mall was originally a branch of the Wilson's chain that is in Columbia. However, the Jefferson City branch was purchased from Terry Wilson and rather than re-brand the location the name was kept. The facility has been through an expansion as adjacent space became available in the mall.



Contained in this facility are: large weight and cardiovascular area, group exercise space, storage, consultation rooms, massage, tanning, locker rooms, child watch service. Again, this facility is in close proximity to the YMCA West location, however it is also of note that the current growth in Jefferson City is trending westward. Total membership is between 1,000-1,500 individuals. Additionally, Wilson's won an award from the local Chamber for small business of the year.

## 3. Anytime Fitness

This is part of a National chain and has a small storefront location in Jefferson City. The draw to this type of facility is that it truly is available whenever members want to use the facility. Access to the facility is through a swipe card system. While this does provide access 24-hours a day it should be noted that there is not 24-hour on-site supervision of the facility. An important note on this facility is that Anytime Fitness has recently recommitted to upgrading facilities, services and equipment across the country. The market penetration of this particular facility will determine how much it may or may not benefit from that new focus.





#### 4. Capital Region HealthPlex

Capital Region Hospital was at one time interested in a partnership with the City and the YMCA. However, when those partnerships and subsequent facilities did not materialize the hospital choose to pursue their own indoor health facility. The facility boasts a membership of approximately 3,000 individuals and its membership is comprised of hospital employees and members of the surrounding community who may or may not have used the facility for some type of rehabilitation purposes.

Contained in this facility are various cardiovascular machines, free weights, weight machines, group exercise space, therapy/exercise pool, walking track, locker rooms, etc.



The following facilities are also located in Jefferson City proper:

1. Capitol City Cheer – privately held standalone facility that provides programs and services to youth looking to get involved in cheerleading, dance and other associated aspects.
2. Curves – part of the National chain that provides circuit training facilities to women only.
3. Got Skillz – privately held standalone turf facility that provides instructional services for batting and pitching in both baseball and softball. In addition to the turf surface and multiple cages (5+ depending upon configuration) there is a pro-shop and the facility is available for birthday party rentals.
4. Heng’s Gym – privately held work out facility.
5. Washington Park Ice Arena – standalone ice arena that is operated by the Jefferson City Parks, Recreation & Forestry Department. In addition to the sheet of ice there is a pro-shop, concession area, warming area and meeting room which is available for rentals.



In addition to looking at the alternative service providers for fitness and other services B\*K inventoried gymnasium space in the greater Jefferson City area. The following list outlines that inventory. It should be noted that this looks at gymnasium space only.

	Surface	B-Ball	V-Ball	Cross Courts	Size
Belair Elementary	Tile	1	0*	0	Small
Clarence Lawson Elementary	Tile	1	0*	0	Mid
Moreau Heights Elementary	Tile	1	0*	0	Mid
Thorpe J. Gordon Elementary	Tile	1	0*	0	Small
Jefferson City High	Wood	2	3	2	Full & Mid
Lewis & Clark Middle	Wood	1	2	2	Full
Pioneer Trail	Sport Floor	1	0*	0	Mid
Callaway Hills Elementary	Tile	1	0*	0	Mid
North Elementary	Wood	1	0*	0	Mid
Simonsen Ninth Grade Center	Wood	1	1	0	Mid
Trinity Lutheran School	Tile	2	3	3	Full & Mid
Helias High	Wood	2	2	4	Full
Southwest Elementary	Tile	1	0*	0	Small
West Elementary	Tile	1	0*	0	Small
East Elementary	Tile	1	0*	2	Small
Thomas Jefferson Middle	Wood	1	2	2	Full
St. Peter School	Wood	2	3	2	Full
Immaculate Conception School	Wood	1	1	0	Mid
St. Joseph Cathedral School	Wood	1	1	0	Mid
St. Stanislaus School	Sport Tile	1	1	0	Mid
St. Francis Xavier School	Wood	1	1	0	Full
St. Martin School	Sport Floor	1	1	0	Mid
South Elementary School	Tile	1	0*	0	Small
Lincoln University - Jason Gymnasium	Tile	1	2	0	Full
Miller Performing Arts Center	Wood	1	1	0	Mid
Central United Church of Christ	Tile	1	1	0	Mid
First Christian Church	MAC	1	1	0	Mid
Salvation Army	Tile	1	1	0	Small
St. Andrew's Catholic Church	Wood	1	1	0	Mid
Solid Rock Family Church		1			Small
First Baptist Church	Tile	1	1	0	Mid
Blair Oaks Elementary	Tile	1			Small
Blair Oaks High	Wood	1	2	2	Full
First United Methodist Church	MAC	1	2	0	Mid
Concord Baptist Church		1			
First Assembly of God					
Blair Oaks Junior High	Wood	1	1	0	Full

\* Denotes elementary school gymnasiums, where volleyball courts are not to standards for league play, only physical education purposes.



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While there is a significant number of gymnasium spaces within Jefferson City and the surrounding area it is important to note two items. One, some of the best gymnasium spaces are through the school district and those are occupied by the school's programming and are largely unavailable to the Department and public at large for general use. Two, the remaining facilities available are not conducive, due to size or state of repair, to the type of programming the Department wants to continue to sustain and grow.

After analyzing the existing indoor recreation providers in Jefferson City and the primary service area, there appears to be some market for an additional public recreation facility if it has a clear market focus and is different in some respect from the existing facilities.

The biggest need of the Parks & Recreation Department is for multi-use gymnasium space which they have operational control over and program accordingly. This would allow the department to continue to grow their current program offerings and expand based upon need, demand and trend. The other component that is an easy addition to the gymnasium would be an elevated walking/jogging track that could be used year-round by all age groups. While the current inventory of gymnasium facilities in Jefferson City is significant the inventory of groups vying for usage time within those facilities is equally significant.

In order to determine what additional components should be added to the facility there needs to be clear direction as to the cost recovery goals of the facility. If the focus is to recover 100% of the operating cost or as close as possible to that number then the logical step would be to include a significant fitness component. However, fitness is one area of the market in Jefferson City where there is an abundance of providers and the addition of a City operated facility would further deplete the market for those services. If the focus is more in line with providing a service to the community then the other high priority would be to include an indoor aquatic component with a leisure and recreation focus.

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

Reviewing the characteristics of the various markets indicates:

The population of the Primary Service Area is approximately 95,000 which is a relatively large population base to support a community recreation facility. This service area assumes that a Jefferson City facility would achieve the same 15-mile service area penetration as current programs.



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The population is not expected to show significant growth in the next 5 years. However, there is a focused effort by the community to attract and retain young professionals and families to the community. An indoor multi-use recreation facility could aid in that effort.

The private sector hopes to capture between 10% and 15% of a market area (generally in a 3 to 5 mile radius of the club) while public sector facilities target a market of 20% to 30% of an area within a 10 to 15 minute driving distance. Non-profits will have a market draw that is somewhere between the two. These differences are directly related to the business practices of the three types of entities. Private facilities are generally a membership based operation where revenues are almost exclusively derived from membership fees and from program and service expenditures generated from these same individuals. As such it is relatively easy to project market dynamics (distance, eligible households, etc.) for this type of facility. The non-profit sector takes the market a bit further, while still being largely membership based; they often have some limited daily admissions and actively pursue program only members. Program and service options also extend well beyond the sports and fitness area to include everything from child care, to cultural arts and social programs. This expands the market for recreation services to the 15% to 20% range. Public facilities on the other hand generally have readily accessible daily admissions, some form of extended passes as well as annual passes. In addition there are usually a large number of programs that can be accessed without a membership and also a number of community functions and activities where no fee may be collected at all. Most community recreation facilities operate on an ala carte system which greatly expands the market to a broader spectrum of users based on age, income and travel time. As a result the 20% to 30% market penetration rate is obtainable and the geographic area served is generally much larger. It is not inconceivable that over the course of a year's time over 50% of a community's population will have come to a community recreation facility for some use, function or activity. However, due to the variety of program and service options offered by the public sector, fewer annual passes are generally sold than private or non-profit facilities. On the other side it is relatively common to have individuals and families who have memberships at private or non-profit facilities to access public centers for certain services that are either not offered by the others or are not providing them in a manner that meets their needs.

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

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



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**Market Conclusion:**

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

*Opportunities*

- The Jefferson City Parks, Recreation & Forestry Department currently has 1 indoor facility in their inventory, Washington Park Ice Arena. They do not currently have a recreation facility that contains a gymnasium, walk/jog track, or fitness area.
- There is an acute need for more gym space in the area. The Department is highly dependent on the use of school gyms and other providers in the area which are not always available due to various functions, other renters and a fee required for use.
- There are no consistently available large, public, field house facilities that can be rented to support youth or adult sports tournaments and clinics in the immediate Jefferson City market area.
- Despite the presence of a significant number of other providers in the immediate market, the population base in the primary market is large enough to support another indoor recreation facility that has a different market focus.
- An indoor recreation center improves the quality of life in a community and often serves as an economic development engine.

*Challenges*

- There are a significant number of existing fitness and recreation facilities in the immediate Jefferson City service area. Most of these facilities have a strong fitness orientation as well as other sports amenities. In addition the YMCA has a strong family focus.
- Funding, not only for development but also for the operation of an indoor recreation center will have to be clearly defined. It should be expected that the center will operate at a financial deficit every year.
- The Jefferson City Service Area population is older, with a lower median household income level. These demographic characteristics point to an older population that is not necessarily ideal for the support and use of an indoor public community recreation facility. However it is noted that the Baby Boomer generation is staying active much longer and will continue to look for recreation services.



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*Project Direction*

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

- For the project to become a reality, it is absolutely critical that a long term plan to fund the capital construction and yearly operational shortfall of the center is identified.
- If the goal of the Department is to have a facility that they own and operate then the project should emphasize an indoor multi-use recreation facility with a hard court surface that can support multiple basketball (at least 3) and volleyball courts (6 to 8).
- Ideally the same site should be master planned to add a second phase in the future. That phase should include meeting rooms, indoor aquatics, running/walking track, weight room, cardio room and group exercise space. The fitness area should focus on youth team training, active seniors and individuals that are not members of other facilities.

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## **Section II – Public Input Process**

Ballard\*King & Associates places a high priority on the involvement of the public when conducting a comprehensive feasibility study. In fact it could be said that the “success” of a project hinges on the involvement, or lack of involvement from the public at large. Jefferson City Parks, Recreation & Forestry has chosen to approach public involvement on three levels; focus groups, public meetings and a statistically valid survey which has been administered by ETC Institute.

Contained in this section of the report you will find notes from the various focus groups and public meetings that were conducted as well as a summary of the survey findings. There was a great deal of consistency amongst the focus groups and public meetings in that there was a general feeling that Jefferson City needed more indoor multi-use multi-purpose gymnasium space. However in reviewing the results of the survey, while indoor gymnasium and meeting room spaces were important there was an interest in; indoor walking/running track, indoor aquatics, weight training space and cardiovascular training space. The results from the survey were surprising in that the number of alternative service providers in the area would lead one to assume that the public’s need is being met.

Clearly the information gathered in these three layers of public input need to be weighed against the Department’s ability to fund a project, but it does point to the fact that there is support from the community for a Jefferson City indoor multi-use recreation facility.

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**October 20, 9:00A – Wednesday; Jefferson City Parks & Recreation Staff**

The most obvious and glaring deficiency in the Jefferson City facility inventory is for indoor multi-use space. The lack of this space limits the department and staff as to their program offerings and opportunities. Programs offered by the Department are at the mercy of the school district or other organization whose space is rented to operate the program.

Currently the basketball and volleyball leagues and other gym-use programs are capped by lack of available space. An additional hindrance to various gym-use programs offered by the Department is the fact that some of the facilities being used are less than ideal, but the Department is forced to use them because a lack of availability of other spaces. The inclusion of multi-purpose gymnasium space would allow these programs to expand as well as allowing for additional program opportunities and growth.

The inclusion of multi-purpose rooms would allow the Department to offer other, more culturally based programming to the community as a whole. It would also offer the opportunity for profit and non-profit groups alike to host various meetings and events.

*Comments from attendees:*

- Office space is a potential inclusion in the project for current/future staff.
- Location for large public meetings
- Currently churches/schools are being utilized for programming
  - \$15/hour
  - \$40-\$50/night
  - Very little consistency from school to school as it relates to reservation and prioritization of use
- Storage – MORE
- Basketball/Volleyball Courts
  - Volleyball, 30' x 60' (4)
  - Basketball, high school size minimum (2)
- MAC surface would be acceptable
- Dividers between court spaces
- Indoor turf field for youth programming
- Changing rooms (showers optional)
- Elevated walking track
- Adjacent green space would be preferable
- Lobby; welcoming, warm, not antiseptic
- Concession space potential (particularly in evening)

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- Currently the City is not offering any type of fitness, mainly because of space restrictions or lack thereof
  - There is an employee related fitness program
  - Judo and Tai-Chi, Table Tennis, Country Line Dance
  
  - Need for indoor meeting space, multiple adjacent rooms
  - Need for indoor facilities for summer day camp
  - Theater Camps
  - Indoor Playground would be positive
  - Teen Area might be a possibility
  - Indoor Ropes Course
  - Child Care/Child Watch
  - Sand Volleyball Courts
  - Outdoor Playground
  - Outdoor Aquatics
  - Group Exercise Space(s)
  - Archery/Shooting Range
  - Special Needs Area/Special Olympics
  
  - Indoor Pool
    - Family oriented
    - No Lap Lanes
    - People in Jefferson City do go to the ARC for birthday parties
    - No deep water (complaints)

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**November 2, 9:00A – Tuesday; Private Providers**

*Location: Washington Park Ice Arena*

*Attendees From: Steering Committee, Parks & Recreation Commission, Wilson's Fitness, St. Mary's Health Center, Capital Region Medical Center, Got Skillz, YMCA, Cole County Health Dept, Jefferson City Medical Group*

Of the groups that Ballard\*King & Associates met with this group was by far the most reserved in the opinions that they offered. However, the overwhelming message from the group was that they were not “against” the City developing an indoor multi-use recreation facility as long as it did not compete with what they were offering. This brings the idea of the inclusion of fitness component(s) in a Jefferson City facility firmly into contention amongst this group.

It was the feeling of the group that the fitness needs of the community were being met by the current providers. It should be noted however there have been additional fitness providers entering and succeeding in the market place. Furthermore current providers continue to expand and broaden their fitness facility and program offerings. This would not only point to a market which extends beyond Jefferson City proper, but a general trend in society.

B\*K's experience in other communities has been such that a municipally owned facility with fitness components becomes a gateway to the private fitness offerings of a community.

*Comments from attendees:*

- Negatives would be what you would put in the facility, potential competition. Competition fitness in particular is a concern.
- Large number of fitness offerings in this community.
- Interest in multi-purpose use.
  - Volleyball
  - Basketball Court Time
  - Indoor Turf Time
- Linn facility and volleyball (3 court tournaments).
- Indoor pool with group exercise, swim lessons, swimming laps, indoor waterpark.
- Kids and activity levels.
- One on one therapy pool at Healthplex comfortably holds approximately 6. Salt water.
- YMCA is up in membership but programs are flat.
- Wilsons are seeing a slight decline.
- Healthplex is growing very slowly.
- Indoor track that is large enough that you don't do 12 laps.
- St. Mary's skilled care type of maintenance facilities; therapy and arthritis classes.

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- Athletic events.
  - Looking for the great play area, could be an indoor play area or an outdoor play area.
  - Unorganized play.
  - Meeting room space.
  - Spaces for kids to use during the summer.
  - Adjacent green space.
  - Wellness & fitness committees.
  - Corporate wellness programs.
  - Offering more leagues to various age groups in Jefferson City.
  - Sports specific training in a multi-use facility.
  - Club sports, semi-pro youth groups, progression of space.
  - Field time, gymnasium time (prime time).
- 
- If you are going to retain the population and youth within Jefferson City then a facility like this would be a higher priority.
  - Components of the facility will or will not make it a priority.
  - Make sure the facility hits the target in terms of “gaps.”
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- Very conservative community in terms of paying for facilities and programs.
  - Under served minority population.

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**November 2, 10:30A – Tuesday; CVB, Chamber of Commerce, School District**

*Location: Washington Park Ice Arena*

*Attendees From: Convention & Visitors Bureau, Boys & Girls Club, Missouri River Regional Library, Helias, St. Peters, Immaculate Conception, Cole County Residential Services, St. Joseph/Knights Basketball, Special Learning Center, Calvary Lutheran, Lincoln University, Parks & Recreation Commission, City Council, Council for Drug Free Youth*

This group was very interested in the development of an indoor multi-use recreation facility but for very different reasons. The CVB and the Chamber of Commerce were interested because it was felt that this project could be a complimentary facility to the Convention Center Project that they are discussing. The School District was interested in a new indoor facility, but their vision was that of an arena where they could host large basketball and volleyball games and potentially graduation.

With both of these groups their wants and interests in this facility provide challenges. In the potential for this facility to be a complimentary facility to a Convention Center there becomes issues of shared use and more to the point shared parking. In the school district seeing this more as an arena the Parks & Recreation Department may be perpetuating their current problem of the school district limiting the time that may be available for them to run programs.

- Parks Staff, Recreation Commission, Cole County Residential Services, Truman Hotel, CVB, Special Learning Center, Boys & Girls Club, Immaculate Conception School, Lincoln University.

*Comments from attendees:*

- A recreation center can go a long way in enhancing what the community has to offer the public at large.
- Indoor aquatics.
  - Lap Pool, schools
  - Leisure Pool
- Huge need for gymnasium space, re-emphasized.
- YMCA is overcrowded, primarily the gymnasium.
- Less competitive use, more passive use, drop-in space.
- Crafts and arts availability.
- Trips, from one point.
- CVB, opportunities to bring events to the community.
  - Cheerleading
  - Martial Arts
  - Gymnastics

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- Junior College Men's and Women's Basketball Facilities
  - Winter practice sites for softball, baseball, etc.
  - Another sheet of ice would be a positive.
  - A "meeting place" for families and kids.
  - A safe place.
  - Tremendous needs for contained play space (disability community).
    - Smaller kids – smaller spaces, 6-8 in a meeting room type space.
    - Larger kids – larger spaces
    - Self-contained space.
  - Library, meeting room spaces (non-paying)
  - Book drop at a location like the community center.
  - Library programs are maxed based upon space and funds.
  - Teen group is where they are seeing growth.
  - Indoor soccer and those types of spaces.
  - Traveling to Columbia for indoor turf facilities (MAC).
  - Children's museum within the facility.
  - Indoor track, outdoor track.
  - Outdoor playgrounds, indoor playgrounds.
  - Adequate parking at the facility, not necessarily on-street parking.
  - Travel to the facility could be an issue, walking distance and public transportation option.
  - There is a bit of an East/West stigma within the community.
  - Break out spaces within the facility.
  - An underserved minority, low-income segment of the population.
  - Not a large portion of corporate wellness programs.
  - Something that parents want to come to would be important.
    - Coffee shop, fruit, juice, living room spaces, WIFI connectivity.
  - Space for movie nights.
  - Lots of sports that could be with field turf.
  - An open area that you could bring a stage in.
    - Concerts, theaters, etc.
  - Program style space.
  - Non-profits don't want to pay for the space, so the actual venue does not matter.
  - Needs to be a fundamental change in how the town views the parks and recreation services and the cost recovery philosophy.
  - No "place" for teenagers to hang-out.
  - Clearly defined policy on who does pay and who does not pay.
  - There is a great deal of tie in between what the Chamber is doing with regards to retaining young people and this facility.
  - This would be something that would be positive to attract young professionals.

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- Young people being hired into the community typically live in Columbia and commute here.
  - Rotary Youth Initiative was pushing forward on a youth center.
  - Space that is very flexible for use and for meetings.
  
  - High priority within the community but not at the expense of other items.
  - Enough money to take care of what we have, but that doesn't change the priority level within the community.

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**November 2, 12:00P – Tuesday; Elected & Appointed Officials**

*Location: Washington Park Ice Arena*

*Attendees From: YMCA, Steering Committee, Parks Committee, City Council, Parks & Recreation Foundation, City Administrator*

The overwhelming feeling from this group was that if Jefferson City was going to pursue an indoor multi-purpose recreation facility that it be handled correctly and be a place that the community is proud of and wants to come to.

- Parks Recreation Staff, Steering Committee, Parks Foundation, Parks Commission, City Council, Advisory Committee.

*Comments from attendees:*

- A “wow factor” something that is big something that you can be proud of, something that is unique and draws people all on its own.
- Indoor walking track.
- Gymnasium, multi-use.
- Could it serve as a fall-out shelter?
- A central point that could serve as a hub for larger events.
- Meeting room spaces.
- Kitchen facilities.
- Expo. facilities for both inside and out.
- Education spaces for healthy lifestyles and cooking classes.
- A place for bike rental for the trail system (potentially camping gear as well).
- Lincoln University collecting for a pool, how would you leverage those dollars?
  - Partnership opportunity.
- Indoor pool.
  - Exercise, family oriented, diving, competitive swimming.
  - Leisure components at Mizzou are nice.
  - Rolla being used as an example.
- Facility that could host something like an indoor graduation. (5,000-6,000)
- Golf driving range, indoor.
- Archery.
- Basketball, Volleyball, etc.
- Child care space.
- More indoor ice space.
- Group fitness classes, some more cutting edge classes (Zumba, Hot-Yoga, etc.)
- Climbing walls.

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- Racquetball courts, tennis courts.
  - Pistol range as an option.
  - Space for indoor gymnastics.
  - Sufficient space to have parks and recreation staff housed in one location.
  - Spa services.
  - Training facility for young athletes; speed training, specialized training.
  - Indoor field turf.
  - Bowling lanes.
  - Indoor track, traditional 200M track.
  - Seniors need to be educated on what could be offered as to what could take place in the facility.
  - Quality over quantity as it relates to amenities.
  - Partnership with the library.
  - Movie theaters.
  - Stage for performances.
  - Weight rooms, exercise rooms, etc.
  - Concert venue, arena type facilities.
  - Senior nutrition group may have a need for location.
- 
- Proximity to public transportation is important.
  - Close to additional parking that could be shared.
  - Location is going to drive the demographic that is going to use it.
  - Location would be dependent upon which direction the City is growing.
  - Outside people being brought in is another consideration to give to the location.
- 
- The greater share of services should be free and open to the public.
  - Exhaust the partnership opportunities.
  - Low cost to Cole County citizen as possible.
  - Probably shouldn't be a membership fee right at the beginning.
  - Connect between the Recreation Center and the library.
  - Fee for non-Jefferson City residents.

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**November 3, 4:00P – Wednesday, Parks & Recreation User Groups**

*Location: McClung Park Pavilion*

*Attendees From: Show-me Boot Scooters, Red Hatters City Council, Horseshoe Club, Parks & Recreation Staff, Youth Sports Patrons, Adult Sports Patrons, All-Star League Patrons*

*Comments from attendees:*

- Indoor horseshoe courts for pitching.
  - Club would be willing to “help” to some extent.
  - Put together equipment for portable indoor courts.
  - Tournaments are a possibility.
  - 4 portable indoor courts (court refers to a set of pits) 45’x60’
- Central location.
- Gymnasium space.
- General open space, exercise and fitness.
- “Hang-out” space.
- Volleyball space (40 parking spaces per court)
- Spectator seating for various athletic
- Possibility of “doming” an activity; horseshoes pits, volleyball.
- Wood floor for basketball/volleyball.
- Teen center, potential partnership with Boys & Girls Club.
- Dance group would like a wood floor and a larger space.
- Baseball league for special needs children (Miracle Field)
- Outdoor turf fields, ADA compliant, lighted.
- Therapeutic riding center, covered arena.
- Batting cages, indoor.
- Archery range.
- Air rifle shooting area.
- Artificial turf on the inside.
- Seniors – nice comfortable room, chairs tables, games, etc.
  - Off of that space a kitchen, small commercial.
- Indoor swimming pool.
  - Traditional rectangle.
  - More a leisure pool facility.
  - Memorial Park Pool indoors.
  - Diving area.
- Dearborn Michigan facility “has just about everything.”
- Has the capability of an emergency shelter.
- Concessions of some type potentially sophisticated, capability of producing revenue.

- 
- Indoor Olympic size track.
  - Climbing wall, bouldering wall.
  - Pursue all the potential partnerships.
  - Square dance group brings in 1,000-1,500 and they use the facility in Lebanon (Cowen Center).
  - Potentially tie into the Katy Trail.
  - Meeting room space.
  - WIFI connectivity.
  - Along with batting cages would be a pitching cage, to a batter.
  - Appropriate educational material around the facility.
  - Indoor playground area.
  - Racquetball courts, multiple.
  - Sponsored dances and group activities.
  - Sustainability through the facility. (LEED)
  - Adequate storage.
  - Community garden with a seating area.
  - Indoor driving range, digital screens.
  - Some place that you don't necessarily have to have a membership to.
- 
- Based upon current facilities the indoor facility would be a higher priority.
  - Priority level begins to fall when you compare it to the other city needs.
  - Financial sustainability increases the priority level within the community.

---

**November 3, 5:30P – Wednesday; Independent Sports Groups**

*Location: McClung Park Pavillion*

*Attendees:*

- Capital Area Track Club – Various
- Capital Area Volleyball Club – YMCA renting court time (January-April), school district, 120 kids in program, \$50-\$60 per child.
- Central Missouri Volleyball Club – 125 kids, Various Schools, YMCA, \$13/hr-\$20/hr
- Osage Volleyball Club had about 90 kids.
- PAL League (Parochial Athletic League) school sponsored volleyball and basketball program. Grades 5-8. Member schools do no charge rent.
- Jefferson City Basketball Club, 100 kids boys and girls, schools in Jefferson City and outlying area, Russellville, Blair Oaks, Ashland, etc.

*Comments from attendees:*

- Court space.
- Hardwood would be great, but multi-use surface would be appropriate.
- Appropriate spacing between courts.
- Room for spectators, room for concessions.
- Demand for court time.
- Linn activity center.
- A warming kitchen area for concessions.
- A “lay down” area for teams.
- 1-day tournaments, now 2 days with 2 sets of age groups – volleyball.
- 1-day tournament would equal 16 courts – volleyball.
- Biggest trouble is finding enough gym space available.
- Dividers between courts regardless of activity.
- Sound dampening is important.
- Parking space is going to be important.
- Basketball goals with adjustable height.
- Basketball goals that retract in non-traditional direction.
- Basketball, traveling team plays full court, recreation teams play half court.
- Individual mount, retractable volleyball standards.
- For track it would be access to hurdles, high jump, long jump
- 200M indoor track.
- Field house format with court space in the center.
- Scoreboard would be “nice.”
- Wireless scoreboards.

- 
- Locker rooms, but not full service locker rooms.
  - From the baseline you are going to need a full 6' for jump serve and others.
  - Lining is appropriate.
  - 8' x 8' closet would store all of the volleyball stuff of 1 club.
  - Automatic ball return for basketball
  - Scoring table is necessary.
  - Cost of courts needs to be competitive with what is currently being paid.
  - Appropriate lighting.
- 
- Meeting rooms.
  - Indoor aquatics – ARC.
  - Batting cages.
  - Group exercise space.
  - Indoor playground.
  - Indoor golfing.
  - Shooting range.
  - Indoor soccer, or turf surface (would be the preference for track).

#### Volleyball

- December – January, 40hrs per week – Tuesday, Wednesday, Thursday, Sunday
- Tournaments would be Saturdays or Sundays.
- 6:00P-10:00P is the time slot.

#### Basketball

- Would like 40hrs per week.
- Very limited by the school district.

- A facility like this should be a high priority and is a definite need.

---

**November 3, 7:00P – Tuesday; Public Meeting**

*Location: Annex Meeting Room*

*Attendees From: General Public*

*Comments from attendees:*

- They would like to see something like the ARC from Columbia in Jefferson City.
  - Basketball, Volleyball, Group Exercise
  - Currently a lack of practice time for youth activities
- Something for 16-18 year olds
- A facility in Jefferson City that brings everything to one location
- Roller Rink – Multi Activity Surface Area
- Members of the YMCA have very little “open time” for general recreation use of the facility
- Not a lot of open pool time at the YMCA.
- Limited gymnastics w/in the City, while the YMCA has a full facility that is rented and operated by an outside group
- Space for activities like laser tag
- More fun stuff for kids – function of space, but also programming
- Fitness Area – weights, stationary equipment, elliptical
- Indoor Walking Track – larger so not so many laps for a mile
- Batting cages, pitching cages (turf space)
- Indoor turf field
- Place facility either in a central location or on the West side of town
- Indoor Swimming Pool
  - Zero depth
  - Slides
  - Memorial Pool Indoors
  - Waterfalls
  - Water Sprays
  - Flowrider, stationary wave
  - Wave Pool
- Dance Studio – wood floors, ballet bars, mirrors, sound system
- Concessions – typically concession food, but also with healthy options
- Multi-purpose courts
- 200M indoor track (potential high school use)
- Fitness center
- Showers
- Meeting rooms that are multi-purpose (programs)

- 
- 5<sup>th</sup> quarter after football game program
  - Program for teens
  - Teen room, gaming room, soft space
  - Library would be a nice addition
  - East/West side discussion
  - Proximity to public transportation and/or trail system
  - Community Garden

Number one priority from attendees:

- Meeting rooms
- Basketball courts
- Basketball courts
- Ability to use (access)
- Basketball courts w/ track

Concerns from attendees:

- Money
- Will the community support the concept
- Benefits of children

Some attendants felt that the priority would depend upon the other components included in the space.

There was a push amongst this group to examine partnership opportunities.

Additionally, the group “expected” to have to pay something to use the facility. In other words they are familiar with and accepting of the “pay to play” philosophy.

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**November 4, 7:30A – Thursday; Young Business Professionals**

*Location: McClung Park Pavilion*

*Attendees From: Young Professionals Group, Roteract Club, Helias Students, YMCA*

*Comments from attendees:*

- Indoor soccer park turf surface.
- Volleyball courts, hardwood surface.
- Multi-purpose arena, with roll-out turf.
  - Multiple functions that allow indoor functions to potentially come indoors.
- Classroom setting.
  - Fully equipped with AV.
- Meeting space.
  - There is good space in Jefferson City, but it is difficult to secure.
  - Community group becomes difficult as it relates to finances.
- Weight equipment and cardio equipment would be a lower priority.
- A place to host recreational type events.
  - Soccer tournaments.
  - Intramural activities.
- Pool
  - Leisure Pool area, family friend.
  - Hot tub, steam room, sauna.
  - Lap pool tailored to the community's needs.
- Potential for concerts.
- School dances.
- Weddings.
  - Meeting rooms with small warming kitchen.
- Bowling alley.
- Adjacent outdoor space would be a positive.
- Making the property as a whole a destination.
- Outdoor walking track and walking path.
- Indoor track, less laps for a mile.
- Lots of natural light, bring the outdoors in.
- East/West comment.
- Central location of the facility.
- 15 minute drive time is a maximum.
- Kid's activity center (Bonkers).
- Gaming area.
- WIFI connectivity.

- 
- Coffee bar type environment,
  - Café.
  - Study group types of rooms.
  - IMAX Theater.
  - Hands on learning center for children, museum feel.
    - Appeal to the school district.
  - Cooking classes, sewing classes, home economic type spaces.
  - Pilates, Abdominal Classes, Dance Classes.
  - Group exercise studios; wood floor, mirrors, ballet bars.
  - Dance club type space; Friday night dances, theme nights, etc.
  - Lots of different events to bring people to the facility.
  - It would be nice to have an option for membership or drop-in fee.
  - Locker rooms, full service, flat-screen TVs, adequate counter space,
  - Rentable lockers.
  - Towel service.
  - Sitting area within the locker room.
  - Family changing rooms.
  - High school seniors the student unions, student recreation facilities played a role in decision for college/university.
- 
- Community center would lend itself to families, not necessarily the straight out of college young professionals.
  - It might not bring people initially, but would keep people here.
  - More young professionals would live in Jefferson City if there were more jobs.
- 
- Medium to high priority on the development of a multi-use recreation facility.
  - There is certainly a demand for indoor multi-use facilities.
  - Would like to see the facility stay high on the priority list for the City.

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**November 4, 9:00A – Thursday; Public Meeting**

*Location: McClung Park Pavilion*

*Attendees From: YMCA, MRRL, JCPS, Parks & Recreation Commission*

*Comments from attendees:*

- Something that would serve as a teen center. Kids that aren't old enough to drive yet.
- Indoor water.
  - Current channel.
  - Zero entry pool.
  - Space for adults.
  - Separate lap pool.
  - Water aerobics.
  - Warm pool, warm water.
  - Therapy pool would be nice.
  - Slides for the kids.
- Birthday party rooms.
- Indoor playground space, close to birthday party rooms.
- Kids need a place to go.
- An area for movies.
- Meeting rooms that can accommodate 40-50 people.
- Individual storage closets for groups.
- Warming kitchen.
- Gymnasium – 3 courts wide at a minimum for basketball.
  - Multi-purpose floor, not wood.
  - Trade show space.
  - Divider curtains.
  - Seating, tip and roll.
- Tennis courts, outdoor.
- Skate park may still be a need, or revamp the old.
- Roller blade rink, with dasher boards and goals.
- Family changing rooms, cabanas.
- Locker rooms.
  - Individual showers.
  - Towel service.
- Coffee shop, café.
- Soft seating, WIFI.
- Concessions area, catering capabilities.
- Computer room, computer lab.

- Laptop check out system.
- Equipment check-out.
- Volleyball and lots of different sports.
- Game room, traditional, with soft seating.
- Adequate parking.
- Accessibility of other amenities of the community.
- Should be in a big enough space that accommodates everything.
- East/West conversation again.
- Close proximity to public transportation.
- Place it close to future development.
- 15 minute driving distance is acceptable.
- Branch of the library within the community center.
- Lots of technology.
- A place for academic tutoring.
- Close proximity to greenway and trails system.
- Dance classes.
- Educational classes; resume workshops.
- Music, enrichment classes.
- Youth exercise space.
- 200M, indoor track would be great.
- Work-out facilities both weight and cardio equipment.
- Ice arena.
- Indoor turf area; batting cages, soccer, clinic, etc (winter training facility)
- Information center, about all information or options within the community.
- Variety of options with regards to payments makes most sense (household options)
- Dedicated spinning space.
- Flexibility of spaces to accommodate different uses.

Highest priority according to the attendees of the meeting:

- Indoor leisure pool.
- Indoor leisure pool.
- Multi-purpose gymnasium.
- Meeting rooms.
- Meeting rooms.
- Educational classes.
- Gymnasium space
- 3-4 indoor basketball courts.
- Location, accessibility
- Cycling program, spinning.
- Indoor leisure pool.
- Multi-use gymnasium space.
- Pool, leisure or lap.
- Affordability.
- Indoor water park.
- Gymnasium space.
- Lap swimming.

Concerns

- Money
- Feasibility
- Examine all partnership opportunities
- Location

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**January 11, 6:00P – Tuesday; Public Meeting**

*Location: City Council Chambers*

The purpose of this public meeting was to present the information collected thus far by B\*K in the investigation of multi-purpose recreation facility. During the course of the meeting information was presented on the following; demographics of the community, focus group and stakeholder input, along with survey results.

As a part of the meeting all of the individuals in attendance were asked to identify their top 3 priorities in regards to parks and recreation projects, along with their top 3 facility components that could be included in a multi-use recreation facility.

It is important to note that the responses attendees provided to these questions were very much in line with the data collected at the focus groups and stakeholder meetings.

**Parks & Recreation Projects That Households Feel Would Have the Greatest Impact on Making Jefferson City an Attractive Place to Live, Work and Play**

- **13 - Build Indoor Multi-Use Recreation Center**
- **14 - Continue Implementing Greenway Trail Master Plan**
- 6 - Outdoor Playgrounds Rehabilitation
- 2 - Acquire/Develop more Small Neighborhood Parks
- 0 - Renovate/Expand Washington Park Ice Arena
- 0 - Re-Pave Park Roadways and Parking Lots
- 3 - Complete Golf course Renovation Plan
- 0 - Rehabilitate/Add Lighted Baseball/Softball Fields
- 1 - Build more Rentable Picnic Shelters
- 2 - Replace Washington Park Tennis Courts
- 1 - Acquire Develop Football/Soccer/Lacrosse Fields
- 0 - Expand R.V. Campground Facilities
- 0 - Other



## PUBLIC INPUT PROCESS

*Jefferson City, MO*



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Features That Households Would be Most Likely to Use if Included in a New Indoor Multi-Use Recreation Center in Jefferson City.

- **7 – Indoor Running/Walking Track**
- 1 – Weight Room/Cardiovascular Equipment Area
- **7 – Indoor Aquatics/Swimming Center**
- 0 – Aerobics/Fitness/Dance Space
- 0 – Performing Arts Center for Concerts, Theaters, Etc.
- 2 – Interactive Playground Area for Young Children
- **12 – Gymnasium for basketball, volleyball, etc.**
- **6 – Multipurpose space for classes, meetings, etc.**
- 0 – Events Center
- 0 – Senior citizen area
- 0 – Arts & Crafts Studios
- 0 – Childcare area for parents using facility
- 0 – Indoor ice arena
- 0 – Indoor tennis courts
- 0 – Rock climbing wall
- 2 – Space for teens
- 0 – Racquetball/Handball/Squash/Wallyball Courts
- 4 – Indoor turf
- 1 – Preschool program space
- 0 – Other



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## **Indoor Multi-Use Recreation Center Feasibility Survey**

### **Executive Summary of Citizen Survey Results**

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#### *Overview of the Methodology*

Jefferson City conducted an Indoor Multi-Use Recreation Center Feasibility Survey during November and December of 2010. The purpose of the survey was to gather citizen input to help the City evaluate the feasibility of constructing and operating an indoor multi-use recreation building. The survey was designed to obtain statistically valid results from households throughout Jefferson City. The survey was administered by a combination of mail and phone.

Leisure Vision worked extensively with Jefferson City officials, as well as members of the Ballard\*King and Associates project teams in the development of the survey questionnaire. This work allowed the survey to be tailored to issues of strategic importance to effectively plan the future system.

In November 2010, surveys were mailed to a random sample of 1,500 households throughout Jefferson City. Approximately three days after the surveys were mailed, each household that received a survey also received an electronic voice message encouraging them to complete the survey. In addition, about two weeks after the surveys were mailed, Leisure Vision began contacting households by phone. Those who indicated they had not returned the survey were given the option of completing it by phone.

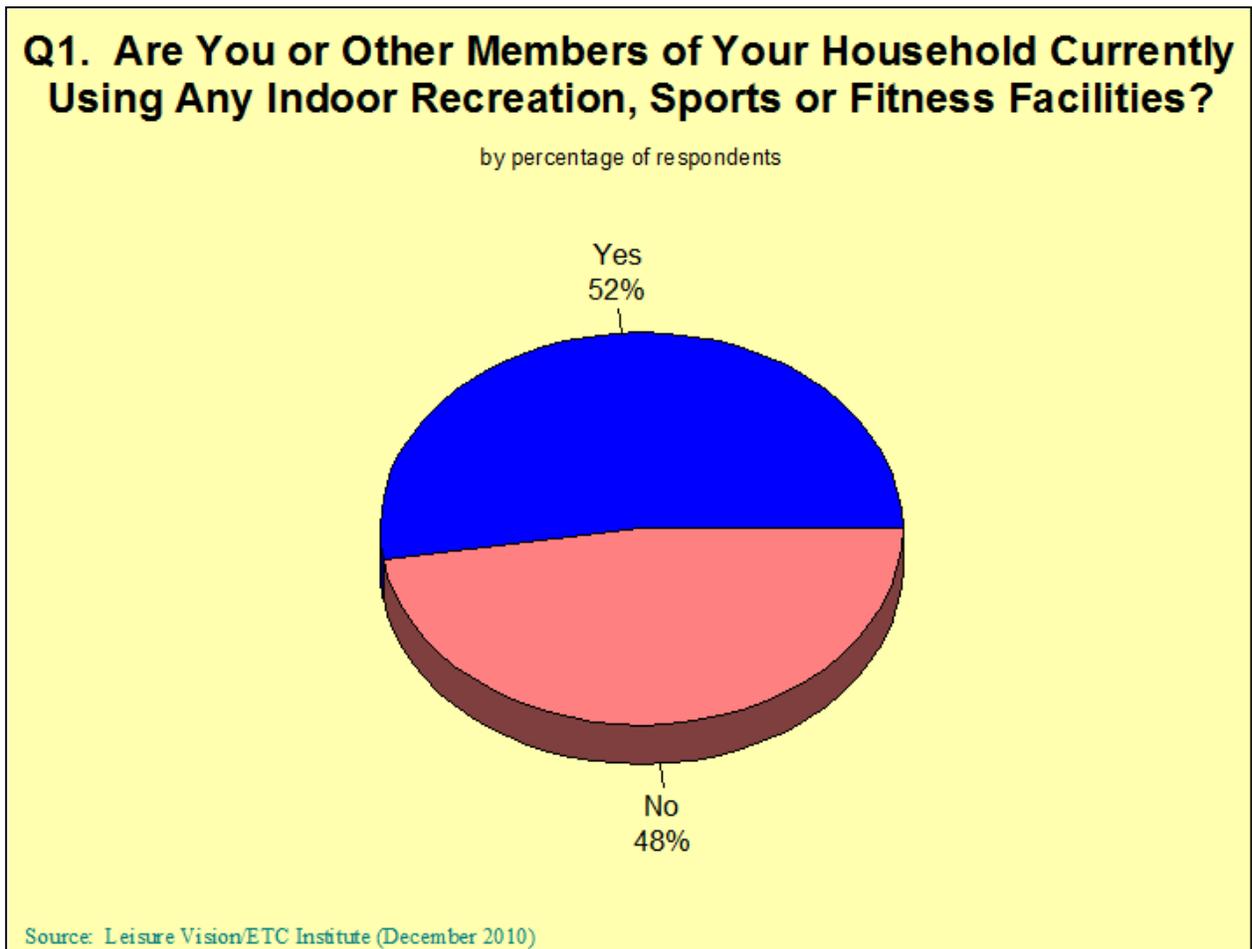
The goal was to obtain a total of at least 300 completed surveys from Jefferson City households. This goal was accomplished, with a total of 313 surveys having been completed. The results of the random sample of 313 households have a 95% level of confidence with a precision of at least +/-5.5%.

The following pages summarize major survey findings:

## *Current Use of Indoor Facilities*

Respondents were asked if any members of their household are currently using indoor recreation, sports, or fitness facilities. The following summarizes key findings:

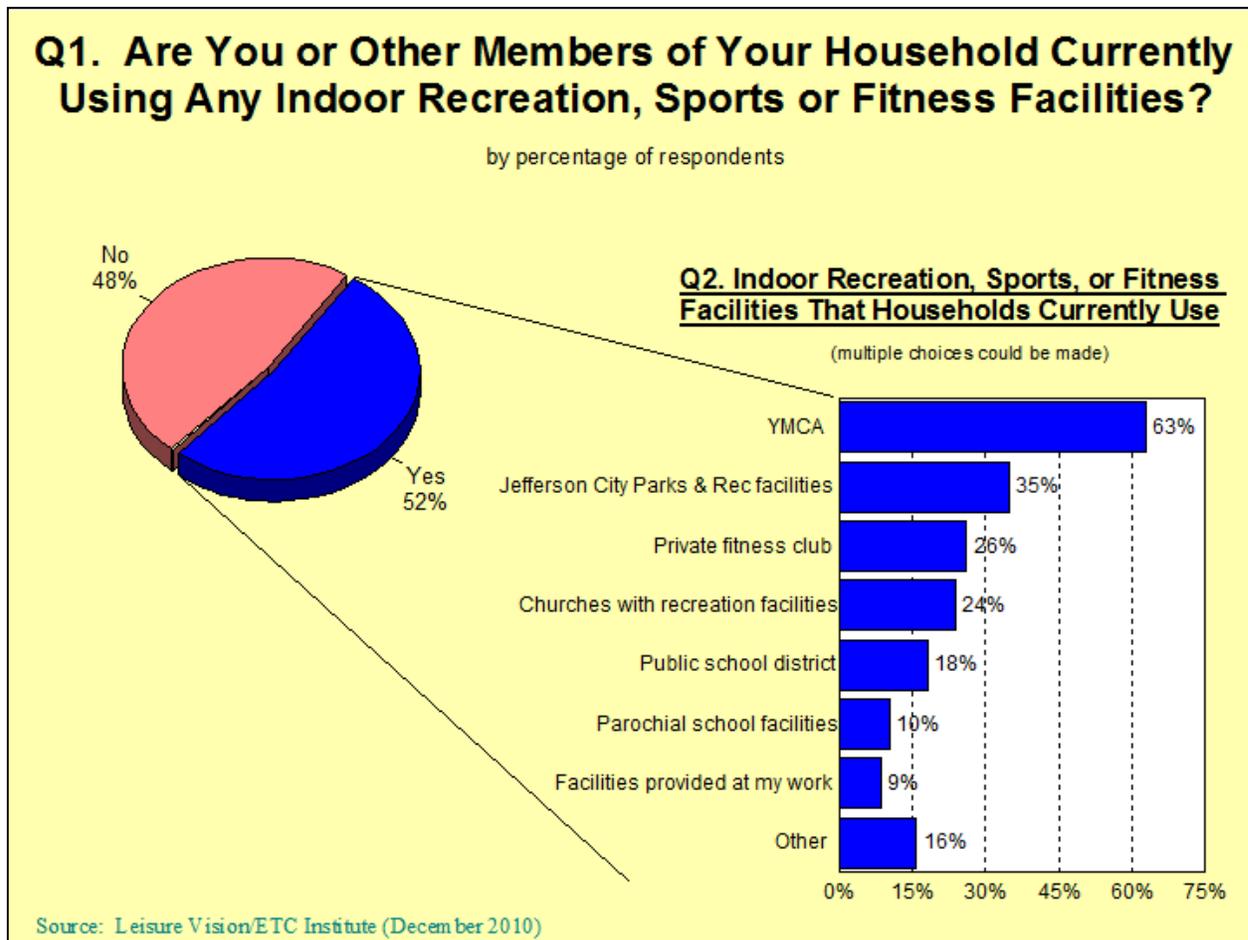
- Fifty-two percent (52%) of households are currently using indoor recreation, sports, or fitness facilities.



## *Indoor Facilities Currently Being Used*

From a list of seven options, households that are currently using indoor recreation, sports, or fitness facilities were asked to indicate all of the facilities they currently use. The following summarizes key findings:

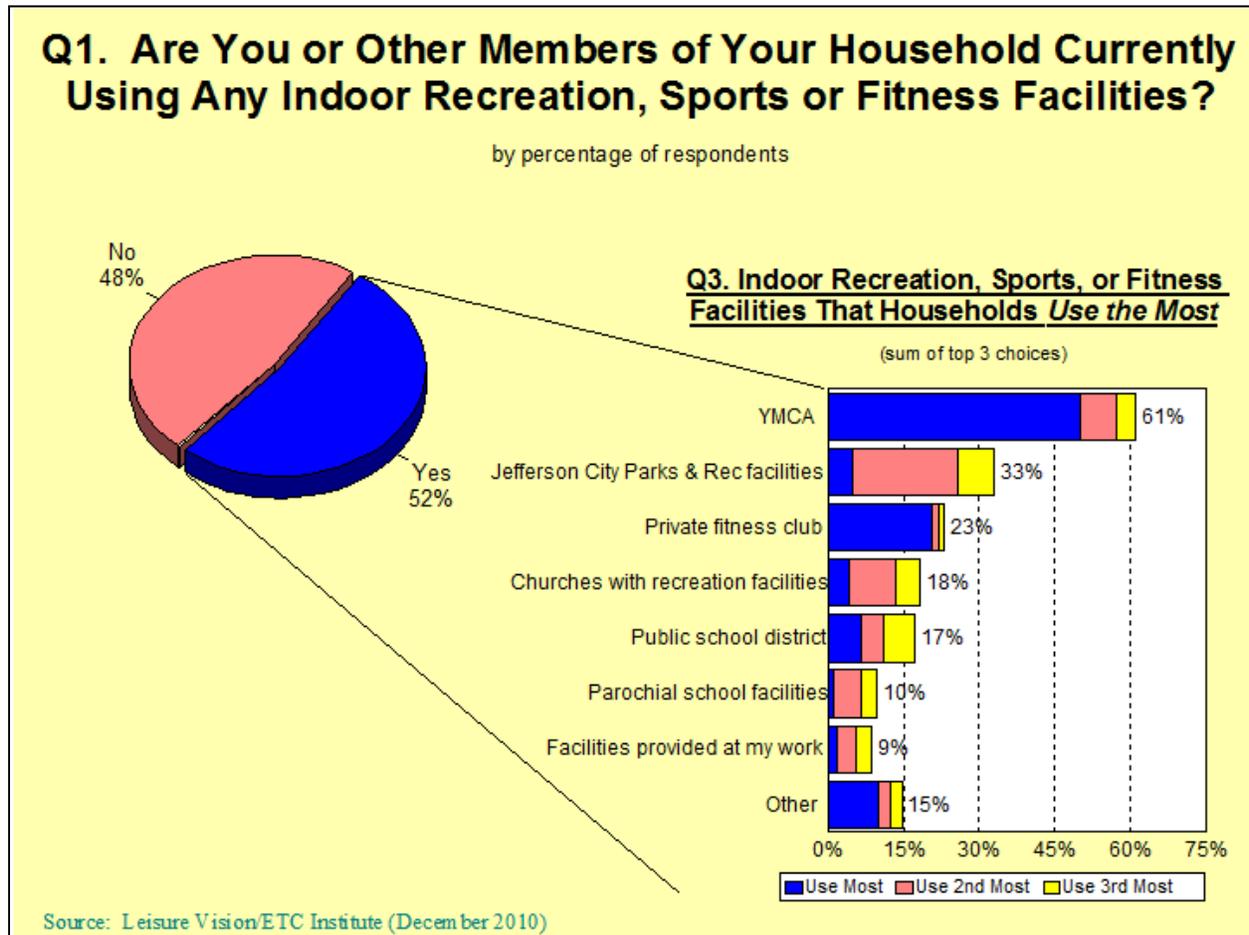
- **Of the 52% of households that are using indoor facilities, 63% are using the YMCA. In addition, 35% are using Jefferson City Parks and Recreation facilities, 26% are using private fitness clubs, and 24% are using churches with recreation facilities.**



### *Indoor Facilities Currently Being Used the Most*

From a list of seven options, households that are currently using indoor recreation, sports, or fitness facilities were asked to select the three facilities that their household uses the most. The following summarizes key findings:

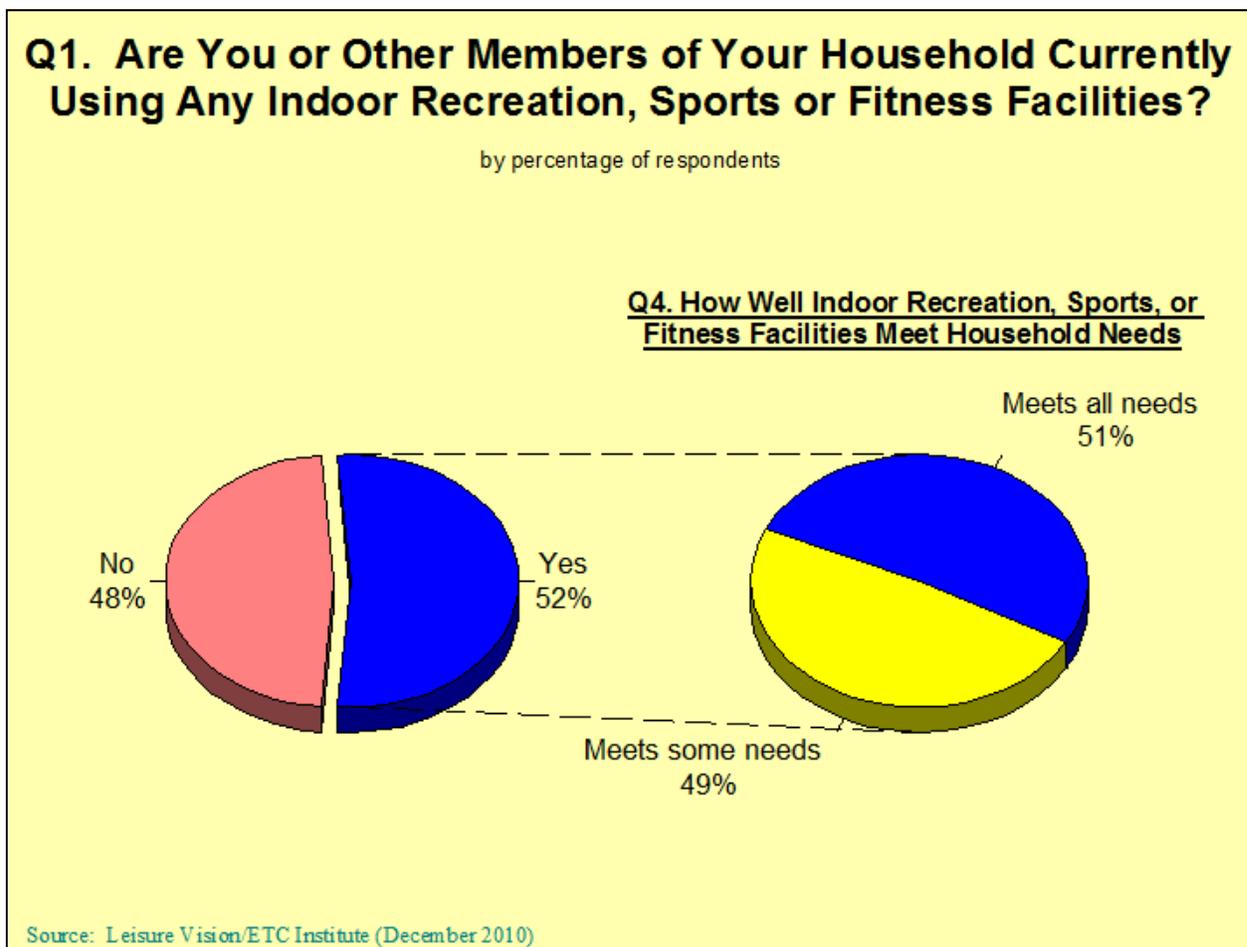
- **Based on the sum of their top three choices, the indoor facilities that households use the most are: YMCA (61%), Jefferson City Parks and Recreation facilities (33%), and private fitness clubs (23%).** It should also be noted that the YMCA had the highest percentage of households select it as their first choice as the facility they use the most.



## *How Well Indoor Facilities Meet Needs*

Households that are currently using indoor recreation, sports, or fitness facilities were asked to indicate how well the indoor facilities they're using meet their needs. The following summarizes key findings:

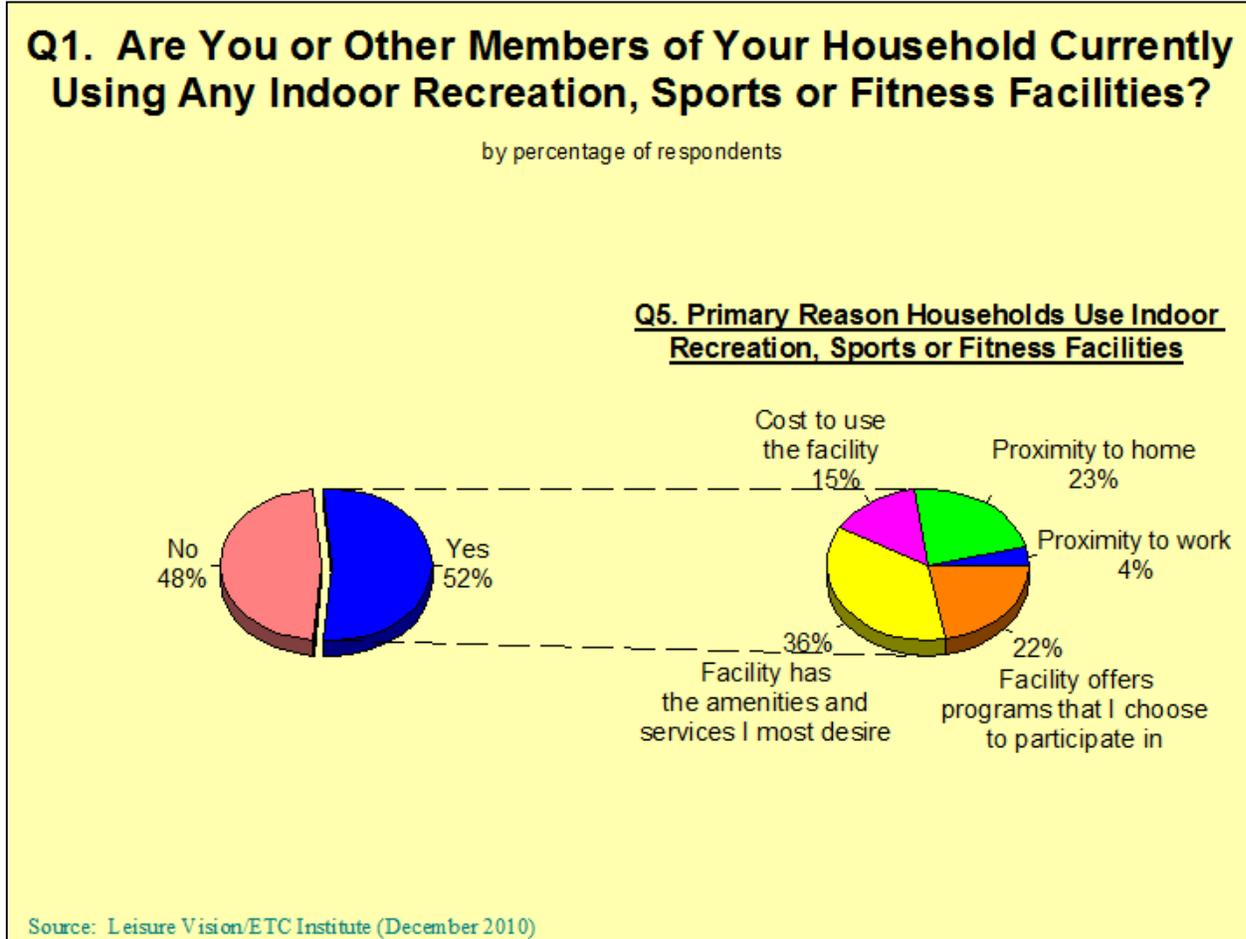
- Of the 52% of households that are using indoor facilities, 51% indicated that the facilities meet all of their needs, and 49% indicated that the facilities meet some of their needs.



## *Primary Reasons for Using Indoor Facilities*

Households that are currently using indoor recreation, sports, or fitness facilities were asked to indicate how well the indoor facilities they're using meet their needs. The following summarizes key findings:

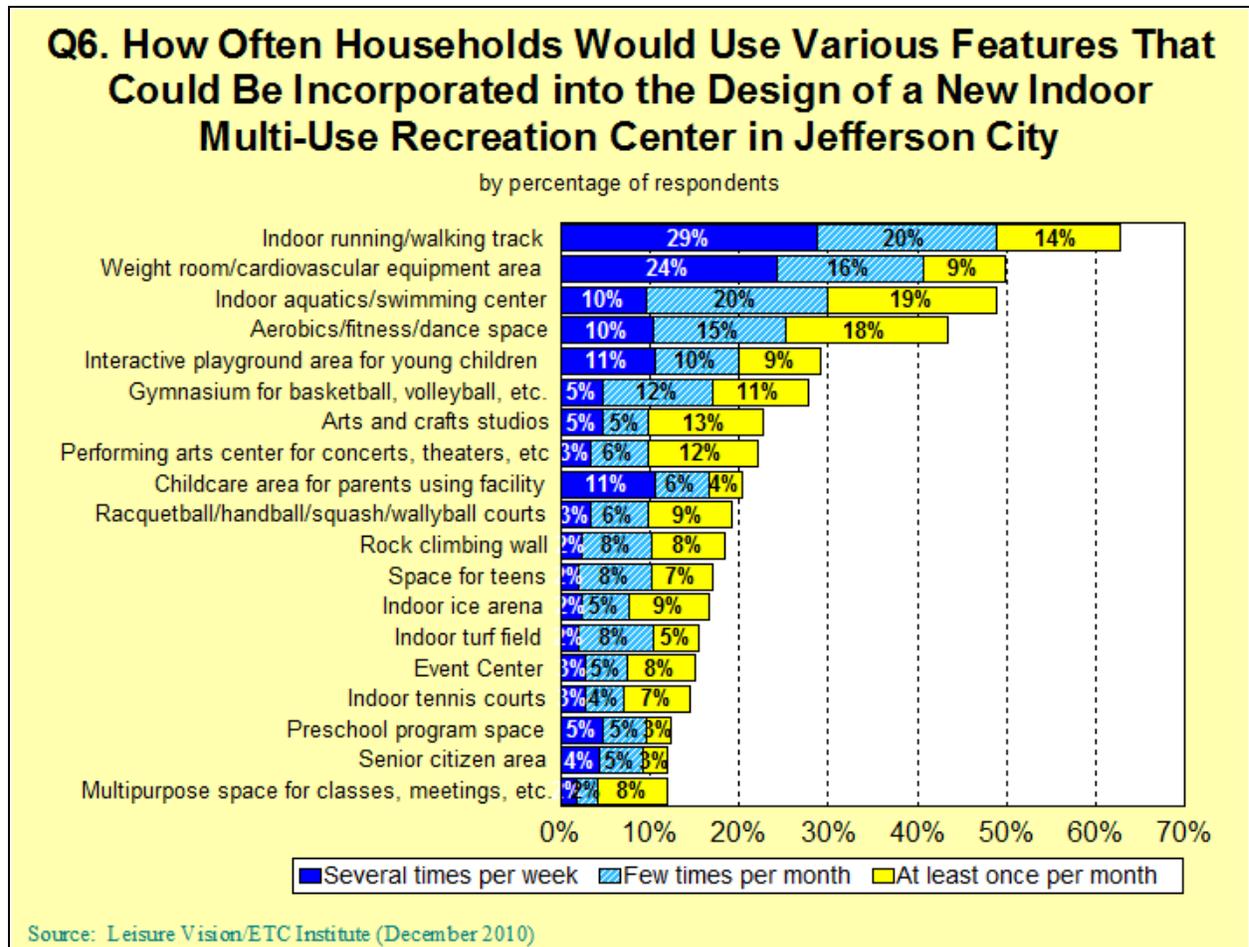
- Of the 52% of households that are using indoor facilities, the most frequently mentioned reasons that households use indoor facilities are: “facility has the amenities and services I most desire” (36%), “proximity to home” (23%), and “facility offers programs that I choose to participate in” (22%).



## *Frequency of Using Potential Indoor Multi-Use Recreation Center Features*

From a list of 19 features that could be incorporated into the design of a new indoor multi-use recreation center in Jefferson City, respondents were asked to indicate how often their household would use each feature. The following summarizes key findings:

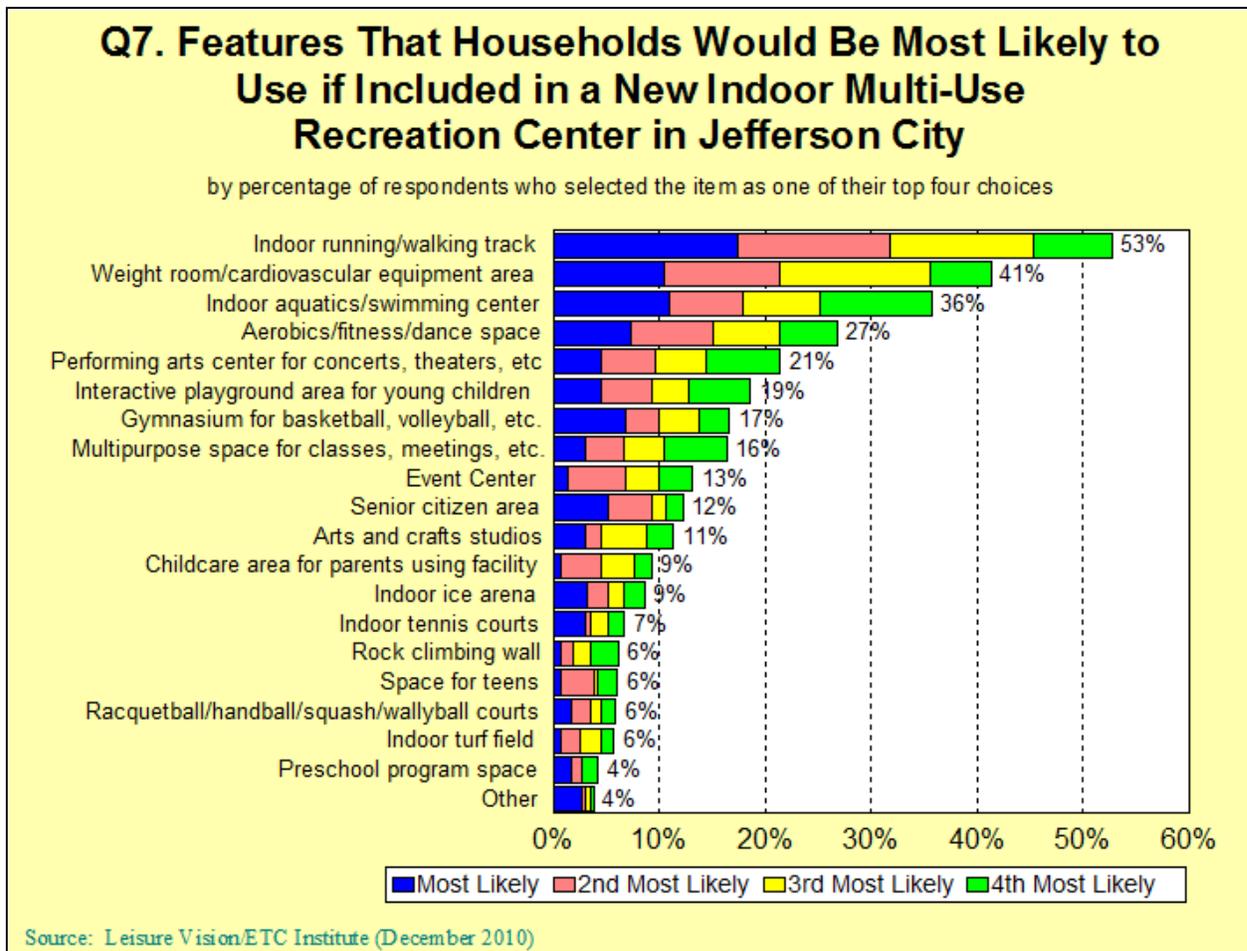
- **The features that the highest percentage of households would use at least once a month at a new indoor multi-use recreation center are: indoor running/walking track (63%), weight room/cardiovascular equipment area (50%), indoor aquatics/swimming center (49%), and aerobics/fitness/dance space (43%).** It should also be noted that an indoor running/walking track is the feature that the highest percentage of households would use several times per week.



## *Indoor Multi-Use Recreation Center Features That Households Would Be Most Likely to Use*

From a list of 19 features that could be incorporated into the design of a new indoor multi-use recreation center in Jefferson City, respondents were asked to select the four features their household would be most likely to use. The following summarizes key findings:

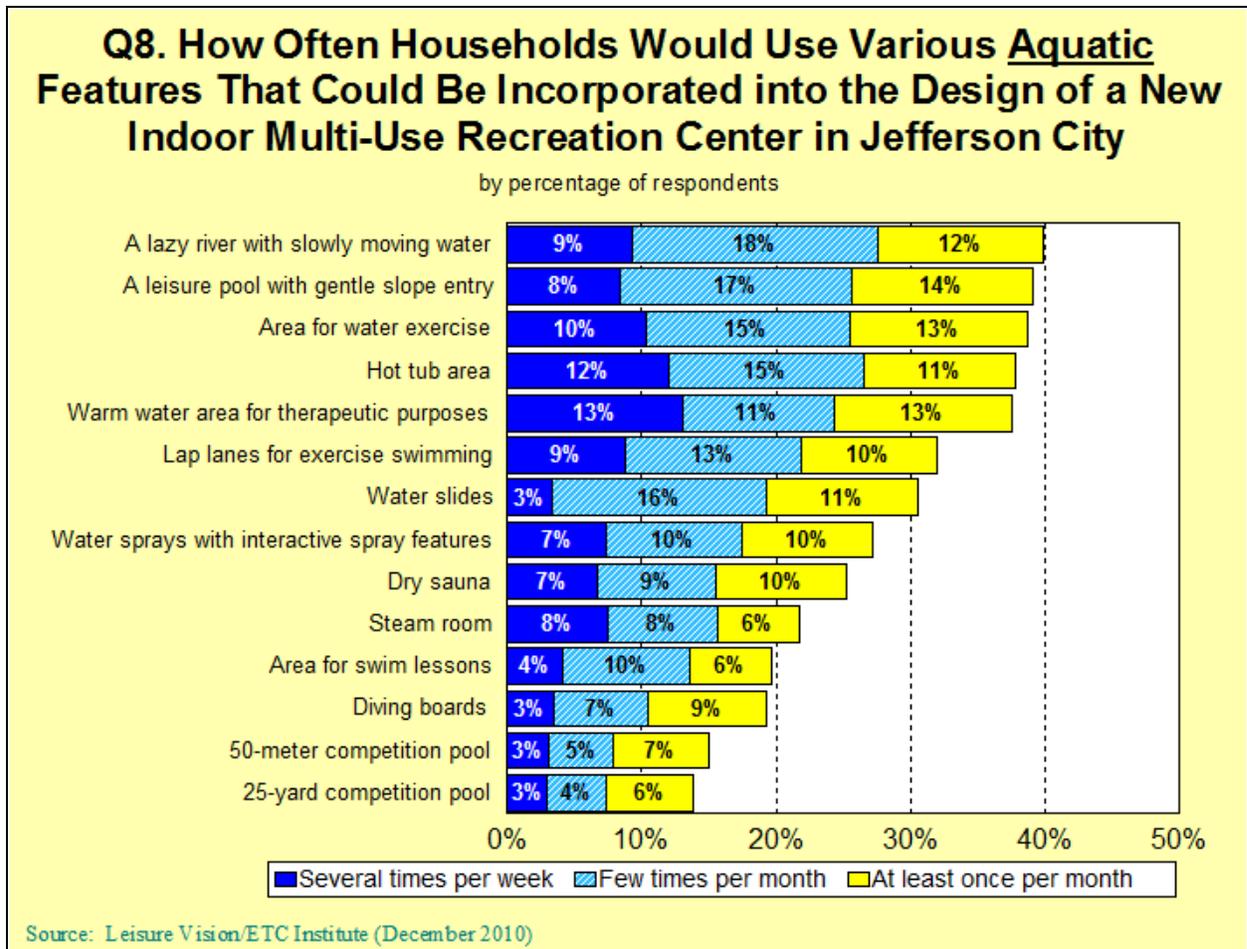
- **Based on the sum of their top four choices, the features that households would be most likely to use at a new indoor multi-use recreation center are: indoor running/walking track (53%), weight room/cardiovascular equipment area (41%), indoor aquatics/swimming center (36%), and aerobics/fitness/dance space (27%).** It should also be noted that an indoor running/walking track had the highest percentage of respondents select it as their first choice as the feature they would be most likely to use.



## *Frequency of Using Potential Indoor Multi-Use Recreation Center Aquatic Features*

From a list of 14 aquatic features that could be incorporated into the design of a new indoor multi-use recreation center in Jefferson City, respondents were asked to indicate how often their household would use each feature. The following summarizes key findings:

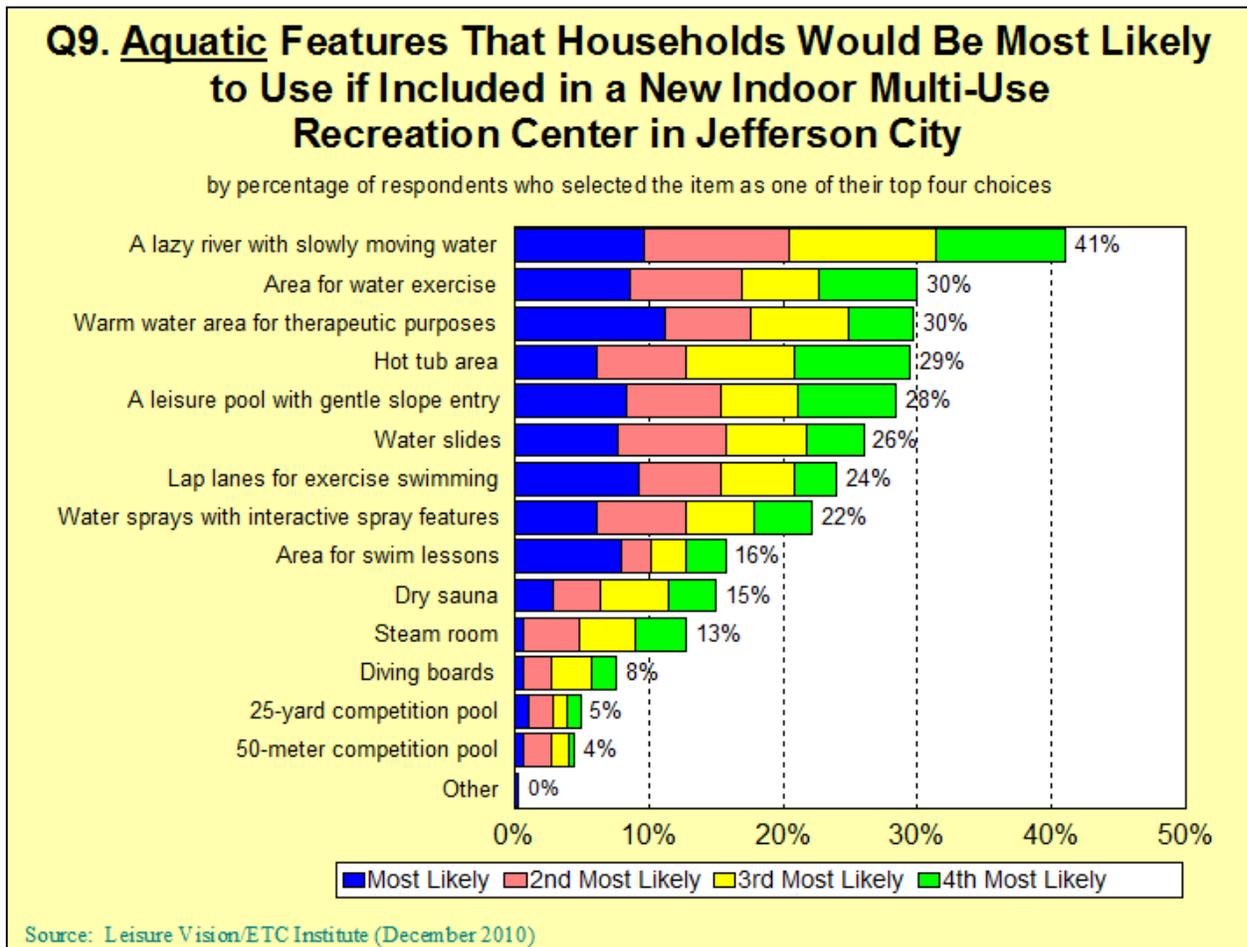
- **The aquatic features that the highest percentage of households would use at least once a month at a new indoor multi-use recreation center are: a lazy river with slowly moving water (39%), a leisure pool with gentle slope entry (39%), and an area for water exercise (38%).** It should also be noted that a warm water area for therapeutic purposes is the aquatic feature that the highest percentage of households would use several times per week.



***Indoor Multi-Use Recreation Aquatic Features Households Would Be Most Likely to Use***

From a list of 14 aquatic features that could be incorporated into the design of a new indoor multi-use recreation center in Jefferson City, respondents were asked to select the four features their household would be most likely to use. The following summarizes key findings:

- **Based on the sum of their top four choices, the aquatic features that households would be most likely to use at a new indoor multi-use recreation center are: a lazy river with slowly moving water (41%), an area for water exercise (30%), and a warm water area for therapeutic purposes (30%).** It should also be noted that a warm water area for therapeutic purposes had the highest percentage of respondents select it as their first choice as the feature they would be most likely to use.



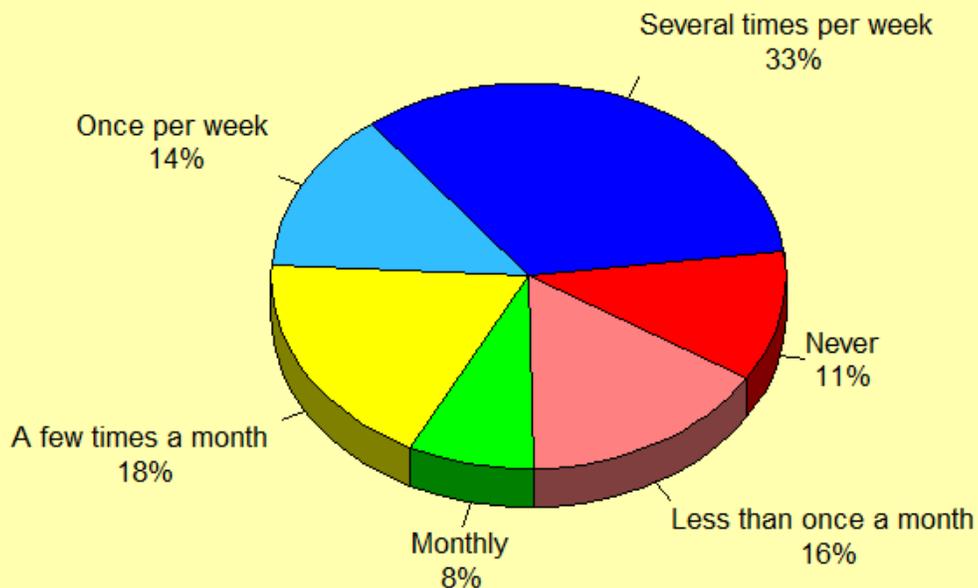
### *Frequency of Visiting a New Indoor Multi-Use Recreation Center*

Respondents were asked to indicate how often their household would visit a new indoor multi-use recreation center in Jefferson City if it had the features they most prefer. The following summarizes key findings:

- Seventy-three percent (73%) of households would visit a new indoor multi-use recreation center with the features they most prefer at least a once a month.** This includes 33% of households that would visit the center several times per week, 14% that would visit it once per week, 18% that would visit it a few times a month, and 8% that would visit it monthly.

#### **Q10. How Often Households Would Visit a New Indoor Multi-Use Recreation Center with the Features They Most Prefer**

by percentage of respondents

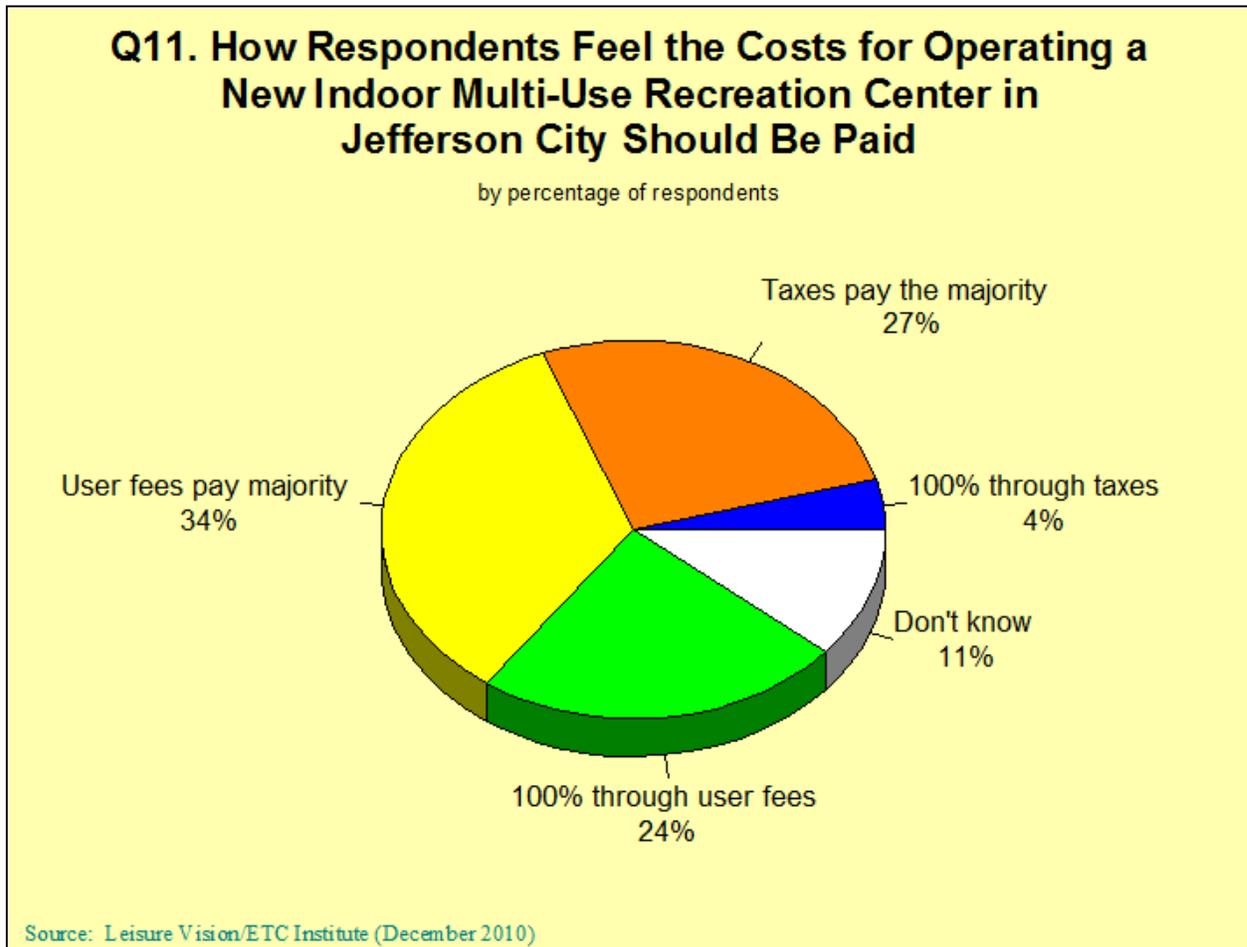


Source: Leisure Vision/ETC Institute (December 2010)

## *Costs for Operating a New Indoor Multi-Use Recreation Center*

From a list of four options, respondents were asked to indicate how they feel the costs of operating a new indoor multi-use recreation center should be paid. The following summarizes key findings:

- **Thirty-four-percent (34%) of respondents feel that user fees should pay the majority of the costs of operating a new indoor multi-use recreation center.** In addition, 27% of respondents feel taxes should pay the majority of costs, and 24% of respondents feel the costs should be paid 100% through user fees.



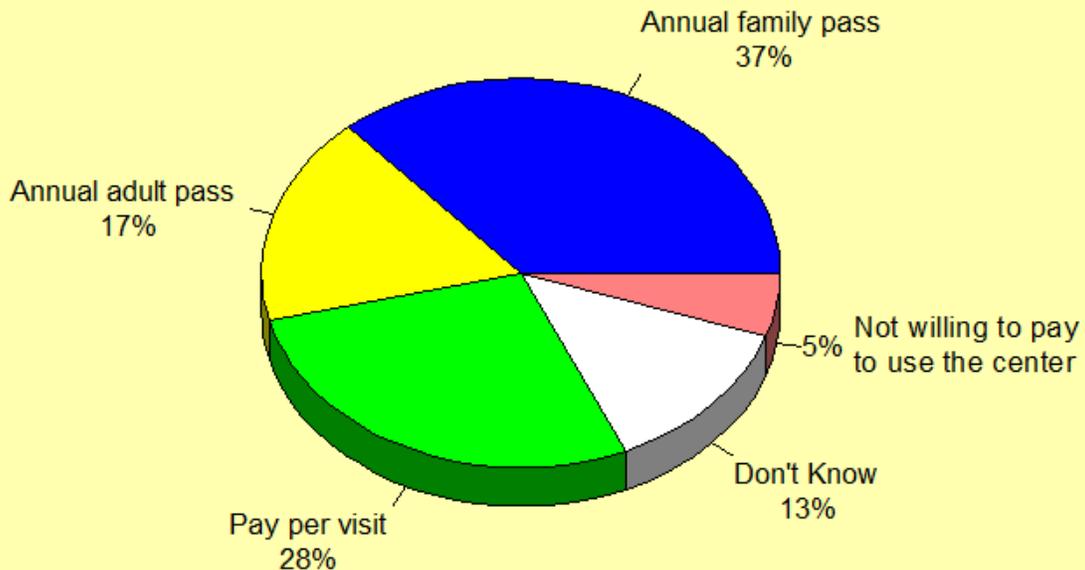
## *Preferred Way of Paying to Use a New Indoor Multi-Use Recreation Center*

From a list of five statements, respondents were asked to indicate their preferred way of paying to use a new indoor multi-use recreation center with the features they most prefer. The following summarizes key findings:

- **Thirty-seven percent (37%) of respondents would prefer to pay with an annual family pass to use a new indoor multi-use recreation center.** In addition, 28% of respondents would prefer to pay per visit, and 17% would prefer to pay with an annual adult pass. Only 5% of respondents indicated they would not pay to use the center.

### **Q12. Preferred Way of Paying to Use a New Indoor Multi-Use Recreation Center if it Had the Features Most Preferred**

by percentage of respondents

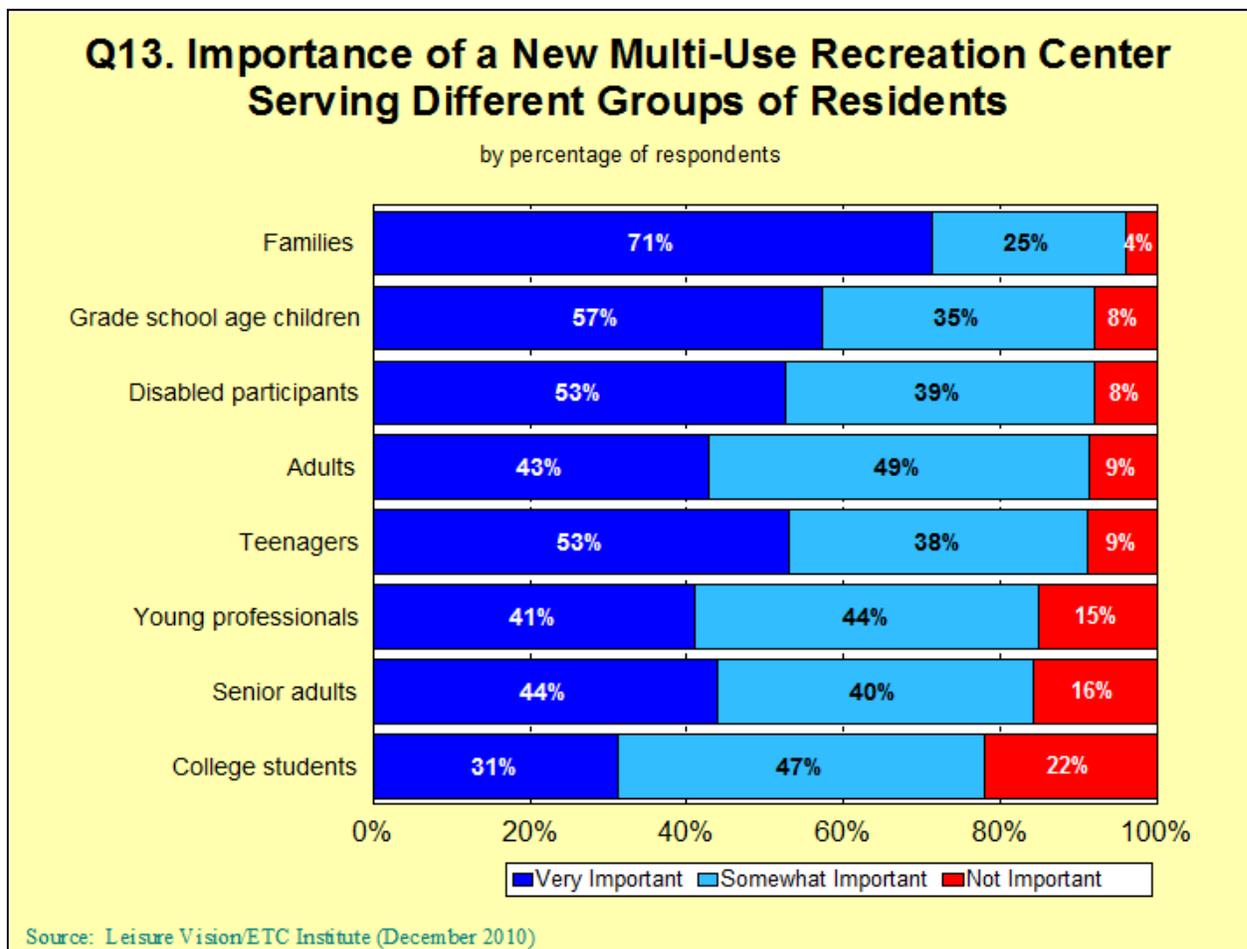


Source: Leisure Vision/ETC Institute (December 2010)

## *Importance of a New Multi-Use Recreation Center Serving Various Groups*

From a list of eight groups of residents, respondents were asked to indicate how important it is for a new indoor multi-use recreation center to serve each group. The following summarizes key findings:

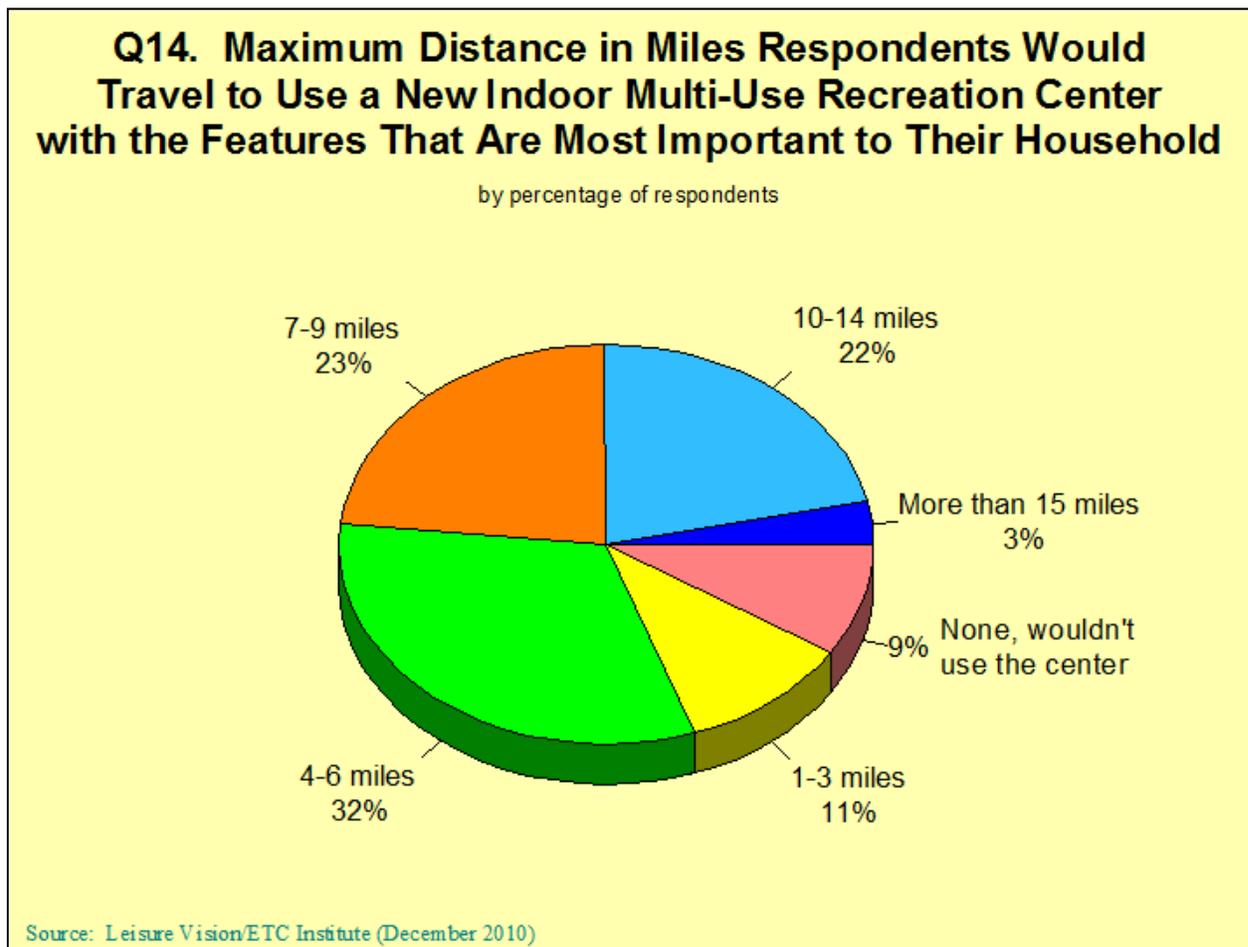
- **Ninety-six percent (96%) of respondents feels it is either very important or somewhat important for a new multi-use recreation center to serve families, 92% feel it's very or somewhat important to serve grade school age children, and 92% feel it's very or somewhat important to serve disabled participants.** It should also be noted that for each of the eight groups of residents, over 75% of respondents feel it's either very important or somewhat important for a new indoor multi-use recreation center to serve the group.



## *Distance Willing to Travel to Use a New Indoor Multi-Use Recreation Center*

From a list of five options, respondents were asked to indicate the maximum distance in miles they would be willing to travel to use a new indoor multi-use recreation center if it had the features that are most important to their household. The following summarizes key findings:

- **Eighty percent (80%) of respondents would travel at least 4 miles to use a new indoor multi-use recreation center if it had the features that are most important to their household.** In addition, 48% of respondents would travel at least 7 miles, and 25% would travel at least 10 miles to use the center.



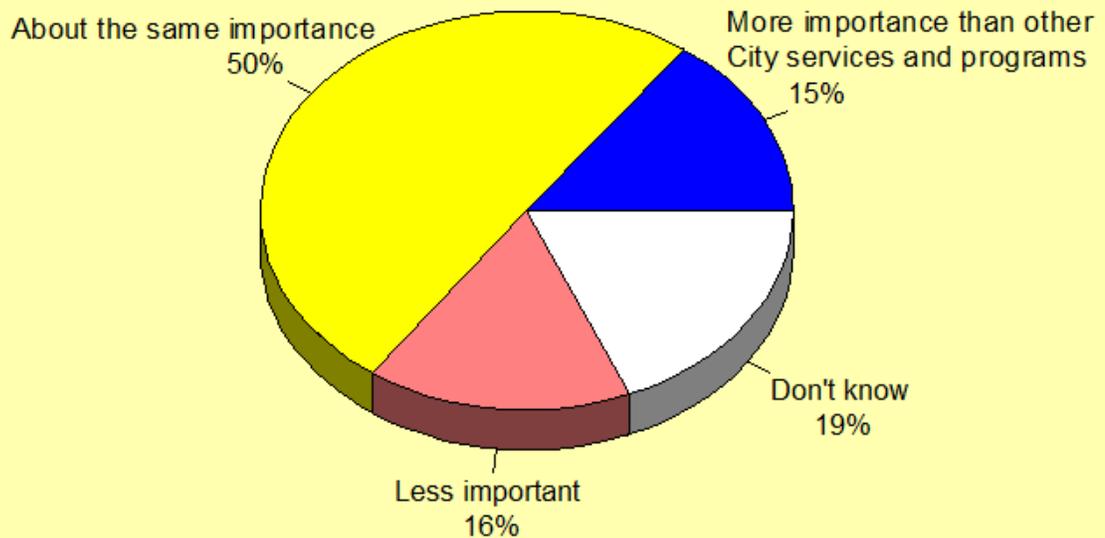
## *Comparing Parks and Recreation Services to Other City Services*

Respondents were asked to compare Jefferson City Parks and Recreation services and facilities to other city services and programs as they relate to the quality of life in their household. The following summarizes key findings:

- **Fifty percent (50%) of respondents feel that parks and recreation services and facilities have about the same importance for their household as other city services and programs.** In addition, 16% of respondents feel parks and recreation services and facilities are less than important than other city services and programs, and 15% feel parks and recreation services and facilities are more important the other city services and programs.

### **Q15. How Would You Compare Jefferson City Parks and Recreation Services and Facilities to Other City Services and Programs as They Relate to the Quality of Life for Your Household?**

by percentage of respondents

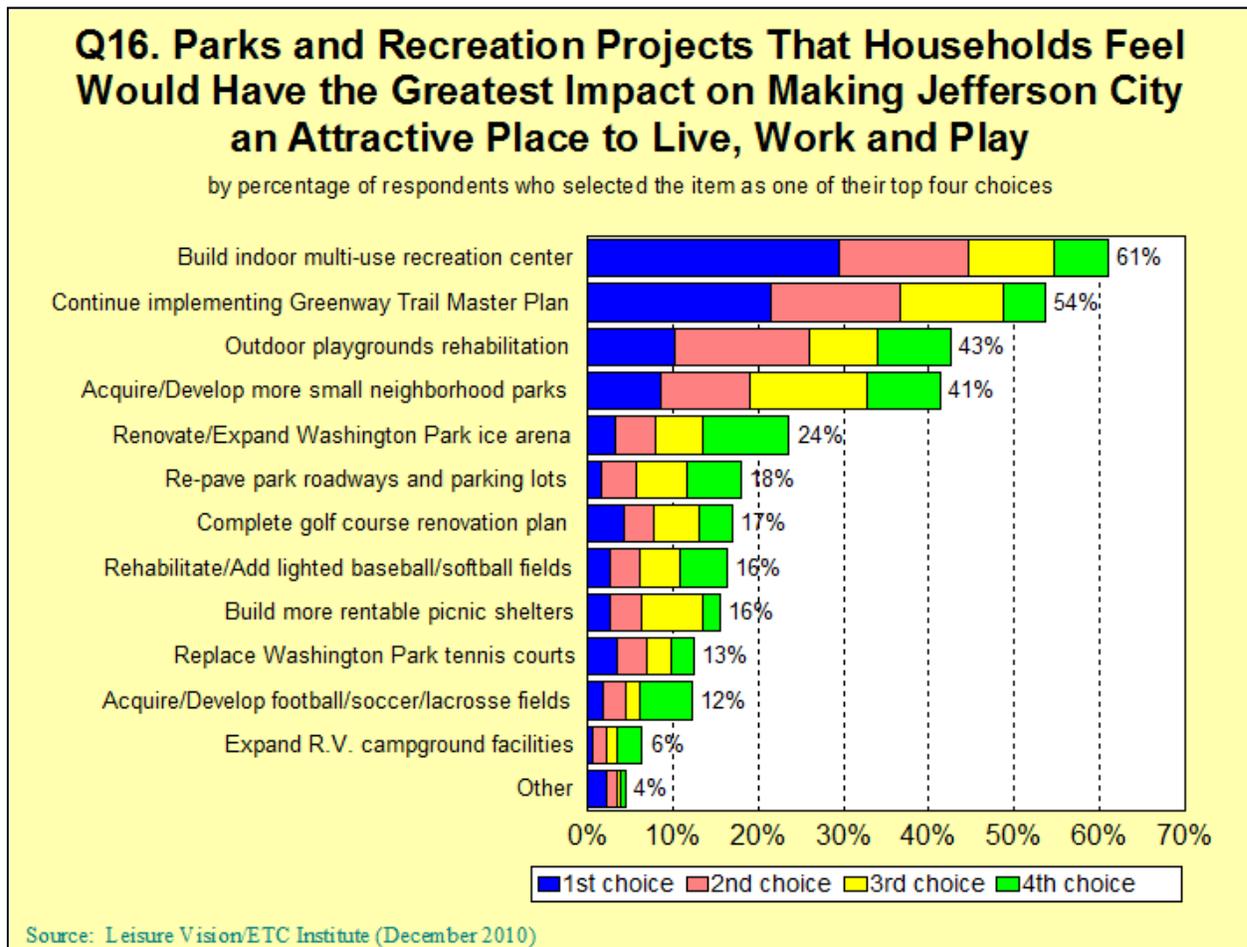


Source: Leisure Vision/ETC Institute (December 2010)

## *Parks and Recreation Projects with the Greatest Impact on Making Jefferson City an Attractive Place to Live, Work and Play*

From a list of 12 various parks and recreation projects, respondents were asked to select the four projects that would have the greatest impact on making Jefferson City an attractive place to live, work, and play. The following summarizes key findings:

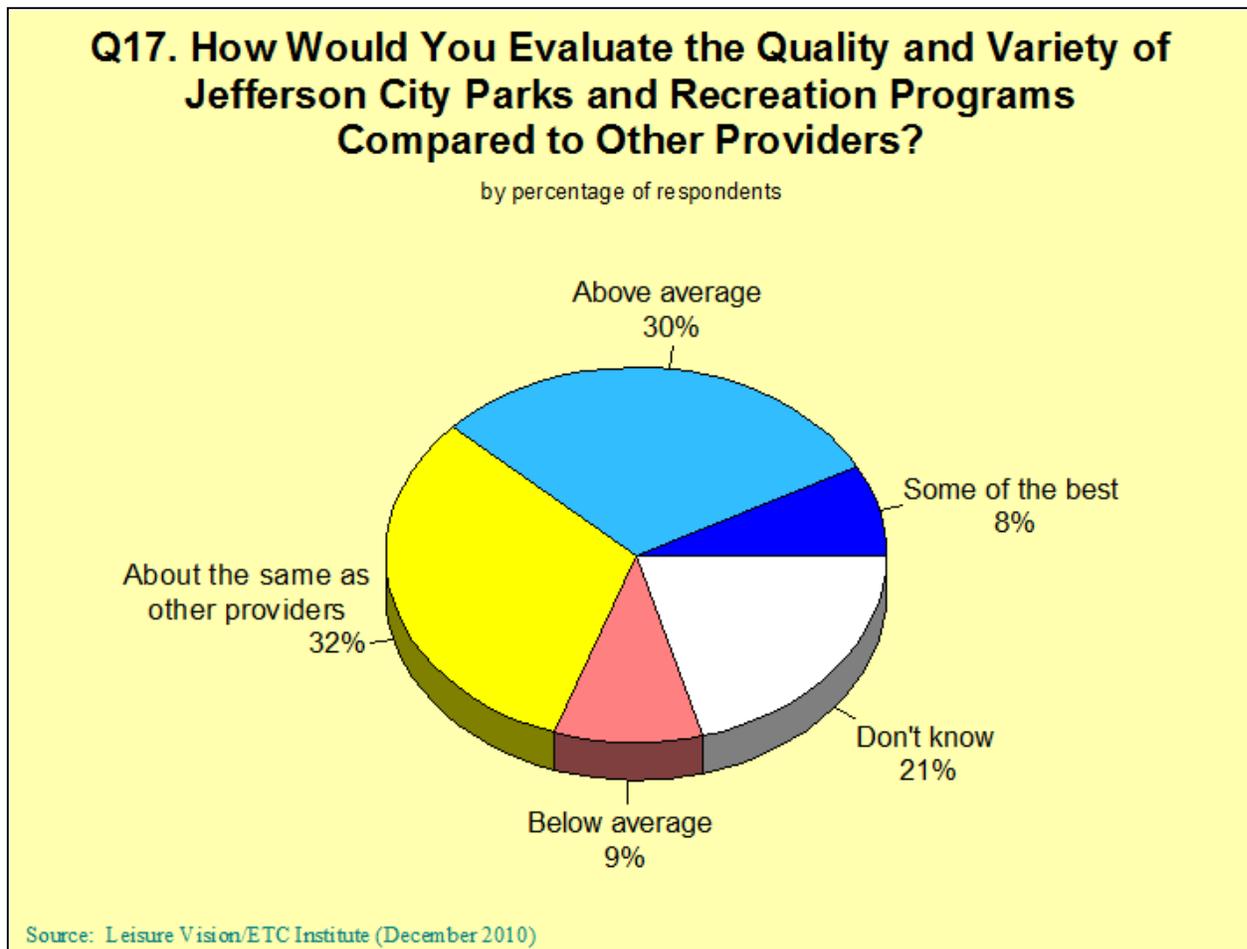
- **Based on the sum of their top four choices, the parks and recreation projects that respondents feel have the greatest impact on making Jefferson City an attractive place to live, work and play are: build an indoor multi-use recreation center (61%), continue implementation of Greenway Trail Master Plan (54%), outdoor playgrounds rehabilitation (43%), and acquire/develop more small neighborhood parks (41%).** It should also be noted that building an indoor multi-use recreation center had the highest percentage of respondents select it as their first choice as the project that has the greatest impact on making Jefferson City an attractive place to live, work and play.



## *Quality and Variety of Jefferson City Parks and Recreation Programs Compared to Other Providers*

Respondents were asked to indicate how they would evaluate the quality and variety of Jefferson City Parks and Recreation programs compared to other providers. The following summarizes key findings:

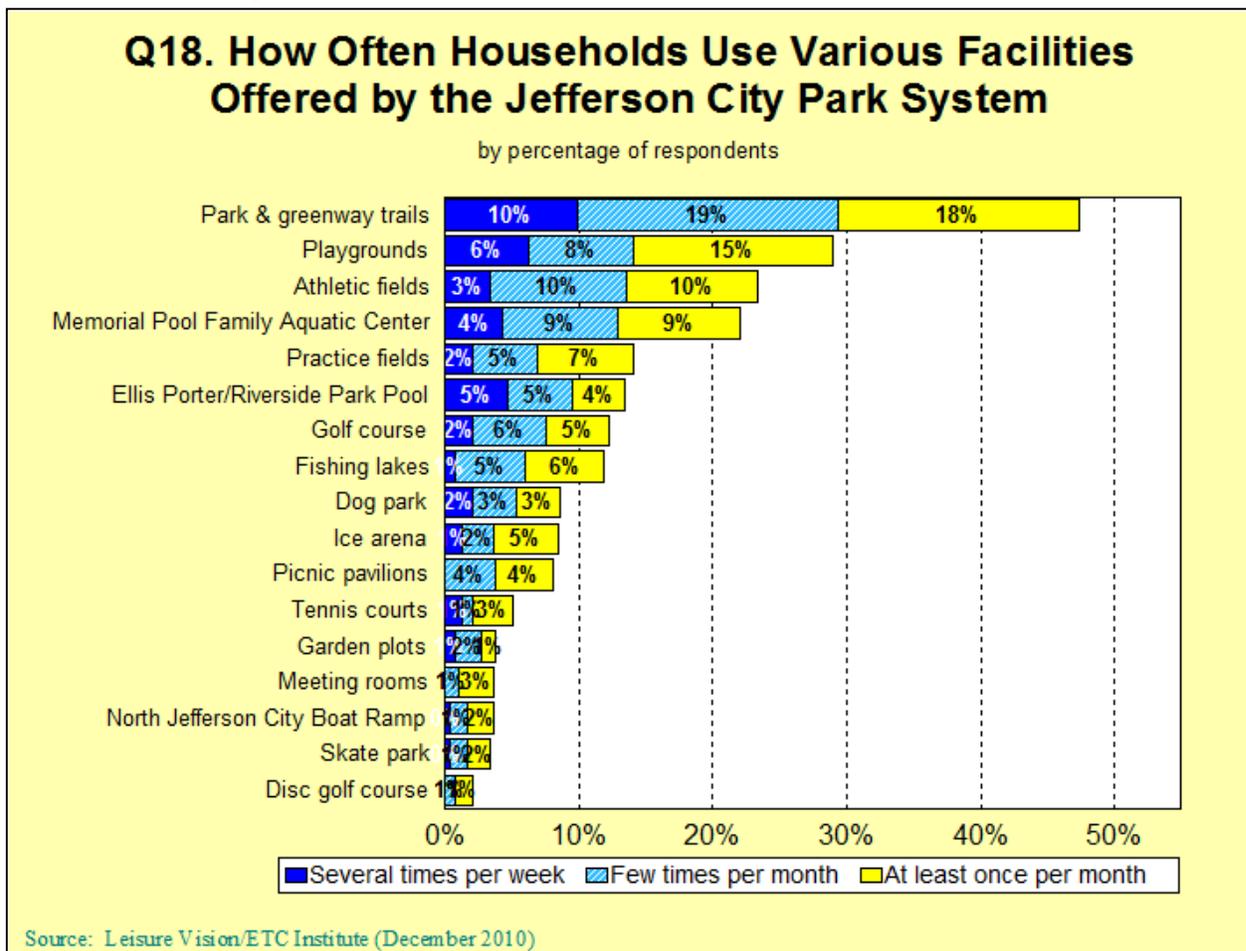
- **Thirty-eight percent (38%) of households rated the quality and variety of Jefferson City Parks and Recreation programs as “some of the best” (8%) or “above average” (30%) compared to the other providers.** In addition, 30% of respondents rated Jefferson City Parks and Recreation programs as “about the same as other providers”, 9% rated them as “below average” and 21% indicated “don’t know”.



## *Frequency of Using Various Jefferson City Park System Facilities*

From a list of 17 facilities offered by the Jefferson City park system, respondents were asked to indicate how often their household uses each facility. The following summarizes key findings:

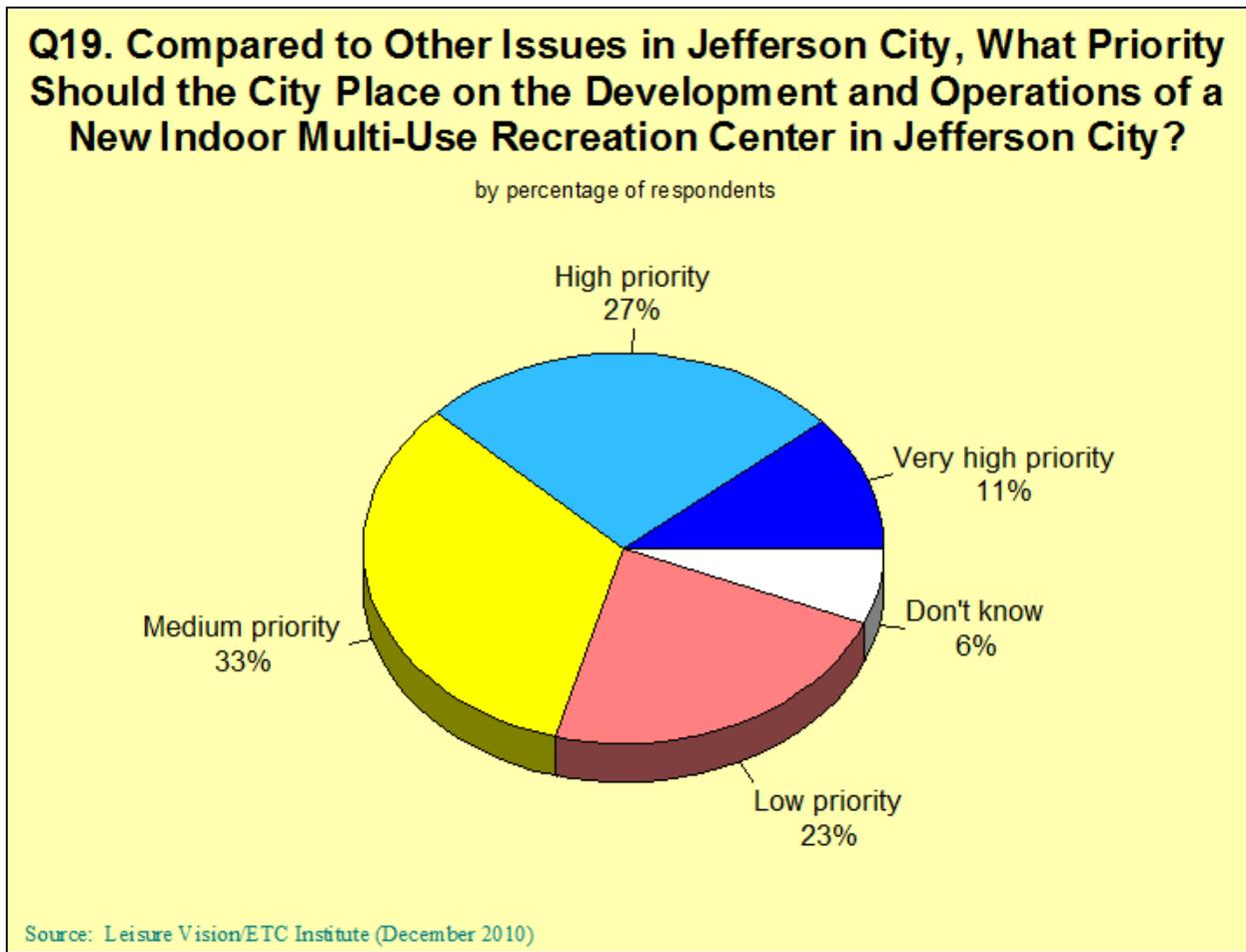
- **The Jefferson City park system facilities that the highest percentage of households use at least once a month are: park and greenway trails (47%), playgrounds (29%), athletic fields (23%), and Memorial Pool Family Aquatic Center (22%).** It should also be noted that park and greenway trails is the facility that the highest percentage of households would use several times per week.



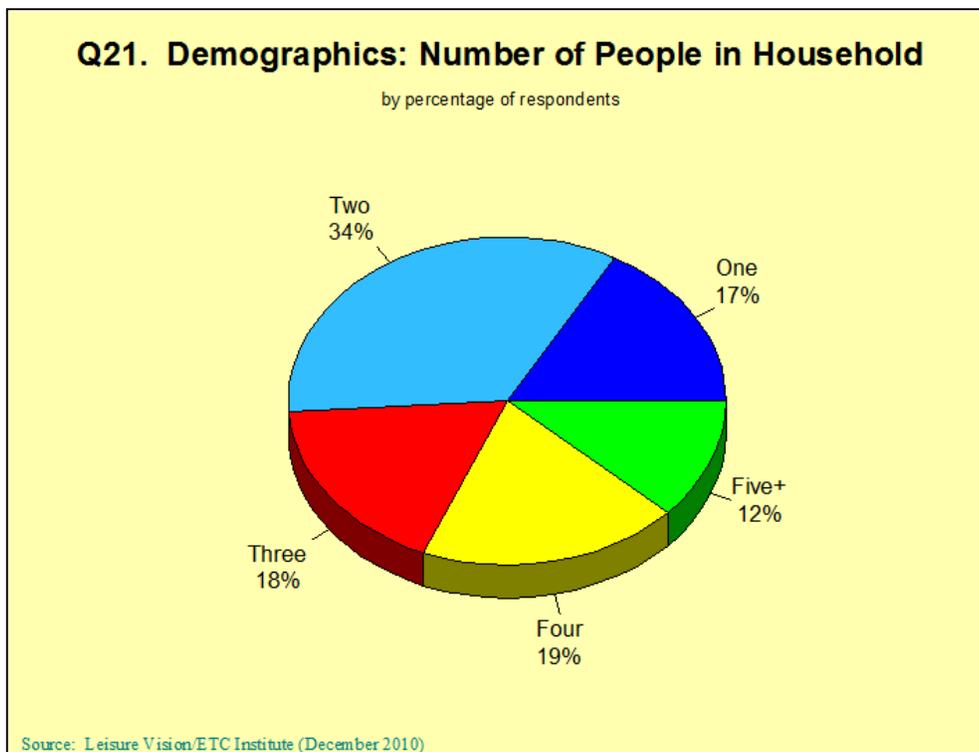
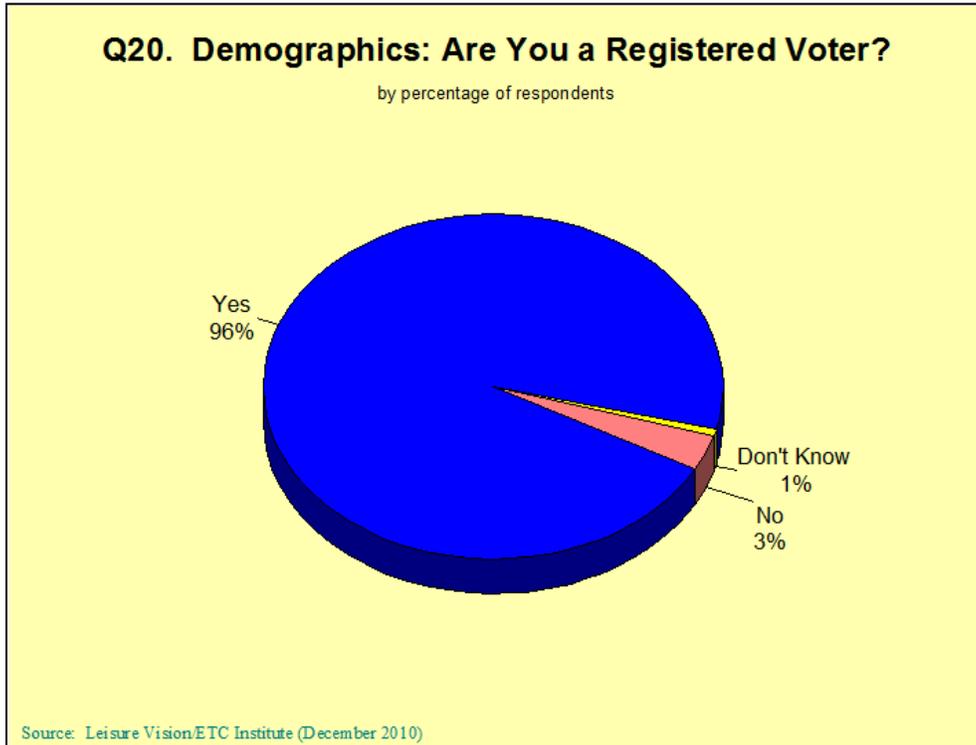
### *Priority That Should Be Placed on a New Indoor Multi-Use Recreation Center*

Respondents were asked to indicate how high of a priority Jefferson City should place on the development and operations of a new indoor multi-use recreation center compared to other issues in the City. The following summarizes key findings:

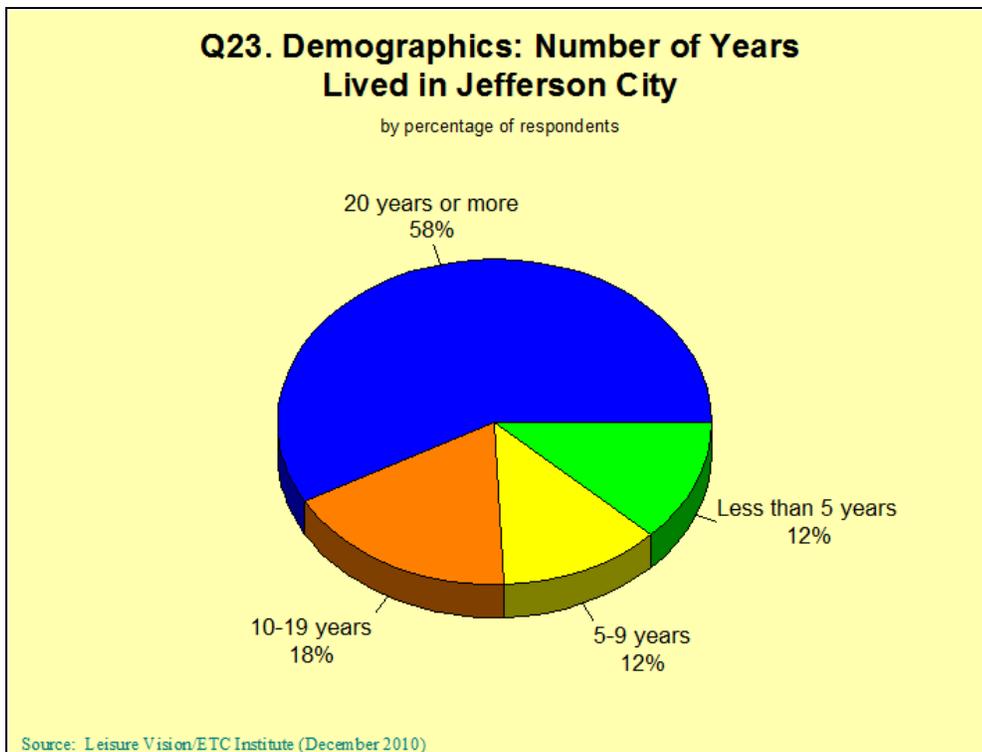
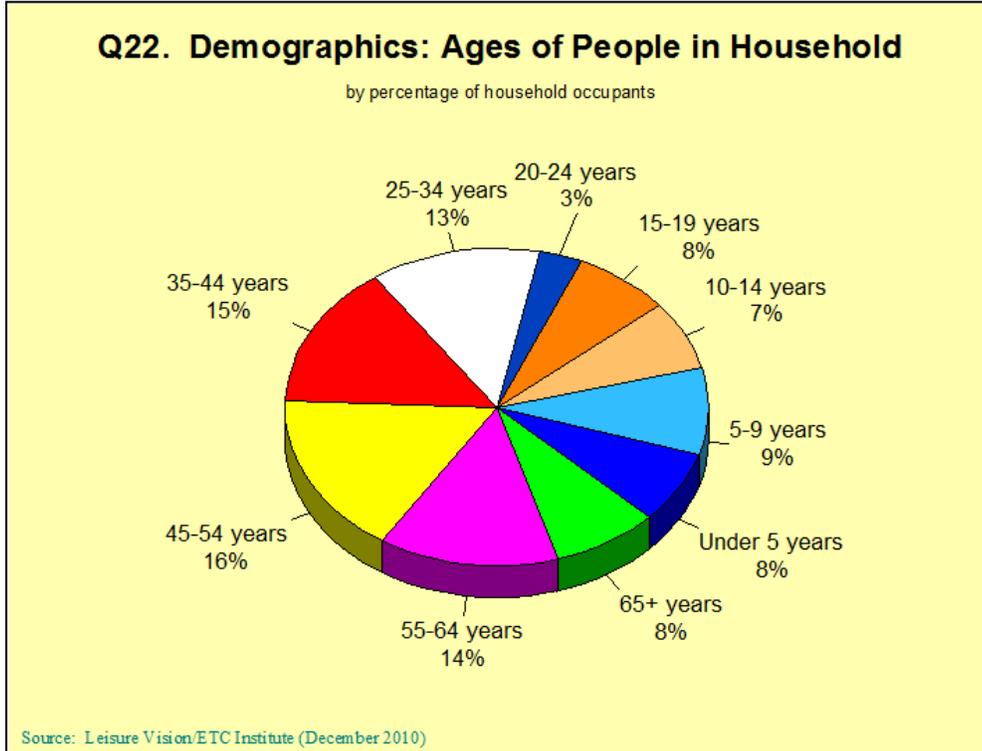
- **Seventy-one percent (71%) of respondents feel that Jefferson City should place at least a medium priority on the development and operations of a new multi-use recreation center compared to other issues in the City.** In addition, 23% of respondents feel that developing a new indoor multi-use recreation center should be a low priority, and 6% indicated “don’t know”.



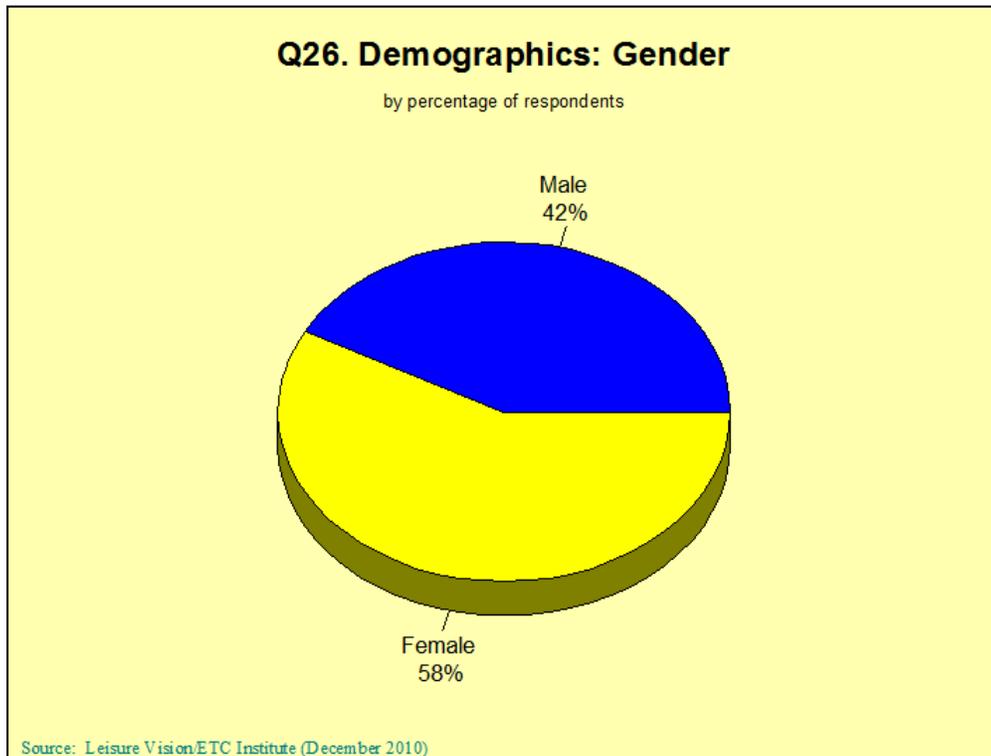
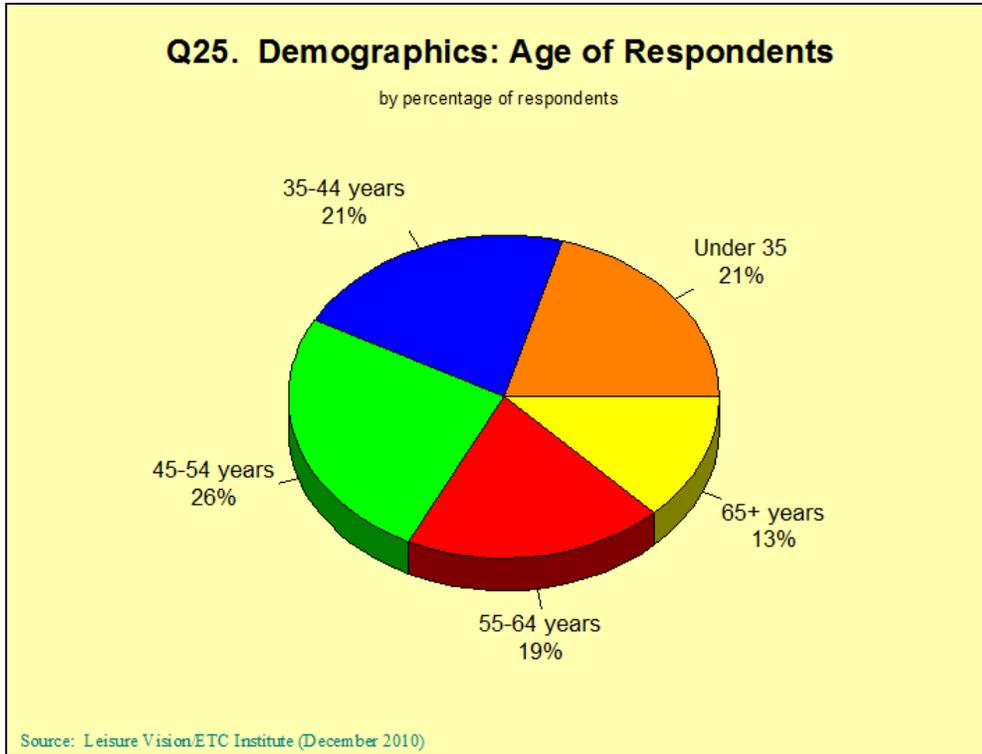
*Demographics*



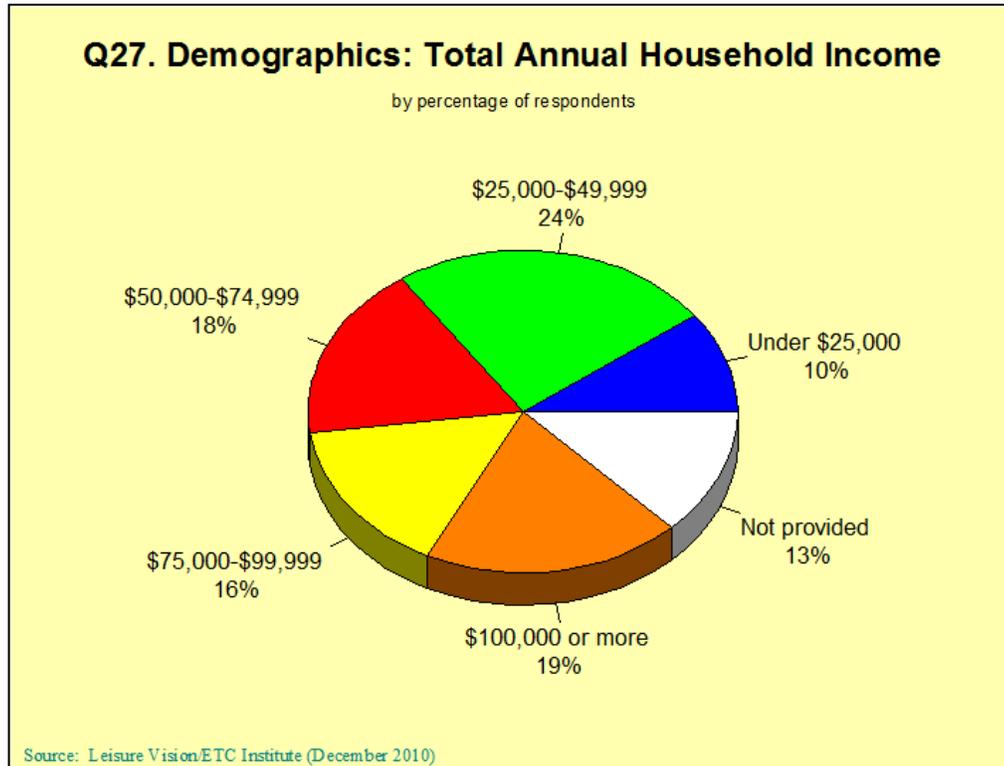
*Demographics*



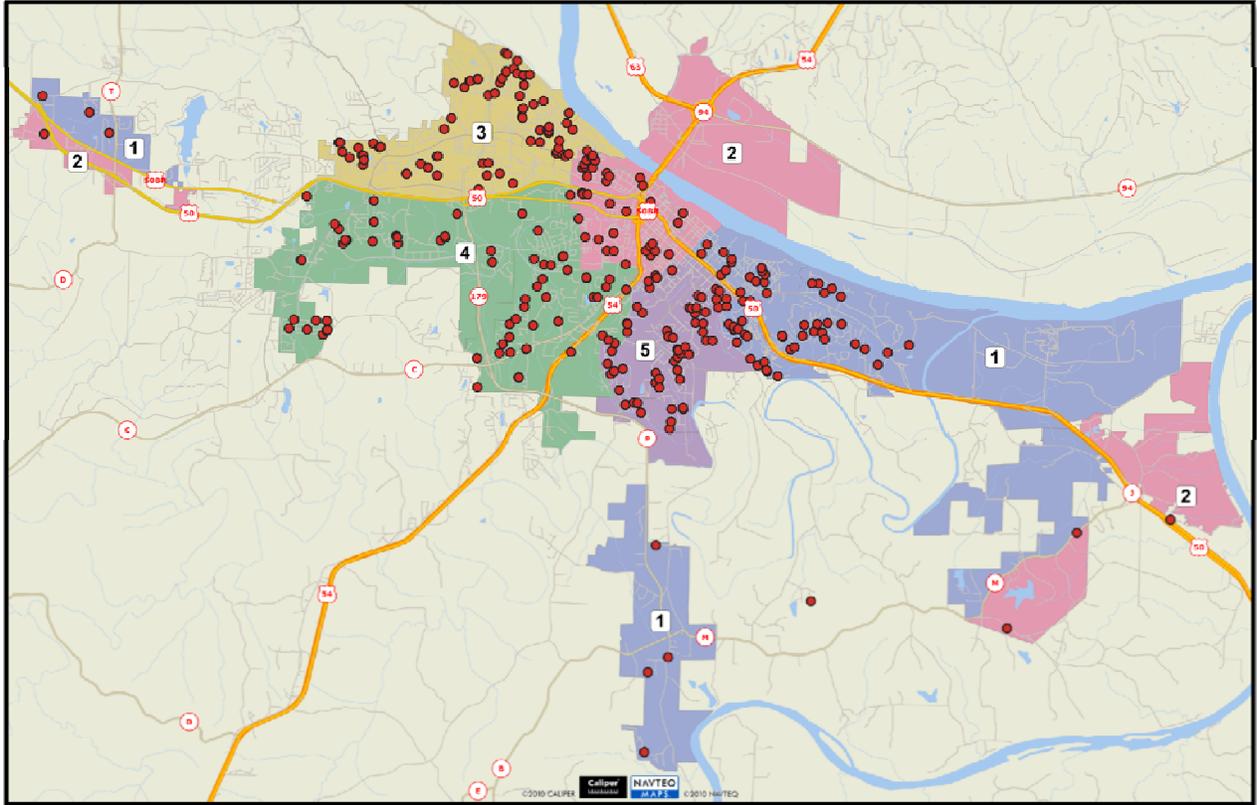
*Demographics*



*Demographics*



*Survey Responses Mapped by Ward*



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### **Statistically Valid Survey Cross Tab Analysis**

In addition to looking at the executive summary and results of the survey it is important to look at the results according to groupings of individuals that participated in the survey. To do this ETC Institute provides Ballard\*King with cross-tabular analysis of various groups.

The groups that will be evaluated through the analysis are:

- Individuals that Have Used Facilities
- Individuals that Have Not Used Facilities
- Households with Less than \$25,000 Annual Income
- Households with Greater than \$100,000 Annual Income
- Households with Children Under 10
- Households with Individuals Age 10-19
- Seniors
- Residents of Jefferson City for 20+ Years
- Residents of Jefferson City for Less Than 5 Years

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## Summary of Findings

- The overall survey results indicated that there is a great deal of Jefferson City residents already using indoor recreation, sports or fitness facilities. This trend continued with the cross-tab analysis as well. The groups where the majority were not using facilities, those with annual household income less than \$25,000 and seniors still had a healthy percentage that were taking advantage of facilities.
- There was a great deal of consistency amongst the facilities that were being used with the YMCA being in the top three of every cross-tab group and the Jefferson City Parks & Recreation Facilities being in the top three of all by one cross-tab group. The degree to which those facilities met or did not meet the user's needs varied from group to group.
- When asked which four features individuals would like to see in an indoor multi-use recreation facility there was again a great deal of consistency amongst the cross-tab groups. An indoor running/walking track and weight room/cardio equipment were in the top four amenities across all cross-tab groups. Indoor aquatics/swimming was in the top four of all groups, except for seniors. It is also noteworthy that in the cross-tab groups of households with less than \$25,000 annual income and seniors the option of "none chosen" received 21.9% and 22.4% respectively.
- When asked which four aquatic features individuals would like to see in an indoor aquatic facility the responses were a little more varied. A lazy river was in the top four in all cross-tab categories and a leisure pool was in the top four for all cross-tab categories except 3. What can be said about the responses as a whole on this question is that a traditional rectangle shaped, cool water facility is not the preference. A facility with warmer water, play features and a family focus is the preference of the community at large.
- If Jefferson City were to build a new indoor multi-use recreation facility is safe to assume that all cross-tab groups would visit the facility on a monthly basis at the least. Only in the cross-tab groups of households with less than \$25,000 annual income and seniors were there a significant percentage that said they would never visit the facility, 21.9% and 22.6% respectively.
- When questioned about how the operations of an indoor multi-use facility should be paid for there was a great deal of consistency in that almost every group thought that user fees should either pay the majority, or 100% of the operation. This is significant, but it also is noteworthy that in all groups a percentage of individuals felt that taxes should pay a portion or in some cases all of the operating expenses. This is particularly noteworthy given the economic climate in the State of Missouri and the Country.

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- It was also felt by all respondents that some form of annual pass, either family or individual, would be the preferred method of payment for admittance to a indoor multi-use recreation facility.
  - When asked to identify if it was; very important, somewhat important or not important for an indoor multi-use recreation facility to serve a various group the number one response amongst all cross-tab groups was families, with grade school age children being in the top three in all but one cross-tab group.
  - All cross-tab groups felt that Jefferson City Parks & Recreation service and facilities were of about the same importance as other public services and facilities in relation to the quality of life for them and their household.
  - There was a great deal of consistency amongst all of the cross-tab groups when asked which four projects would have the greatest impact on making Jefferson City an attractive place to live, work and play. The top two responses amongst all cross-tab groups were either build an indoor multi-use recreation center or continue implementation of Greenway Trail Master Plan. Those two responses were followed by outdoor playground rehabilitation or develop more small neighborhood parks.
  - Jefferson City Parks & Recreation services and facilities ranked about the same to above average according to all groups when compared to other providers in the community. In is noteworthy that the cross-tab groups of individuals who have not used facilities, annual household income of less than \$25,000, seniors and those who have lives 20+ years in Jefferson City had a significant percentage that “didn’t know.” This may point to either a lack of facilities or programs that address the needs of those particular groups.
  - Most cross-tab groups felt the development of a new indoor multi-use recreation facility was a medium to high priority for the community. Households with annual income of less than \$25,000 felt it was a high to very high priority while seniors and individuals living 20+ years in Jefferson City felt it was a medium to low priority.

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### Individuals that Use Facilities

- The three indoor recreation, sports and fitness facilities individuals that use facilities frequent most often are;
  - YMCA – 61.0%
  - Jefferson City Parks & Recreation – 32.9%
  - Private Fitness Club – 23.2%
- For individuals that use facilities 51.5% say that the current facility they use meets all of their needs while 48.5% say that the current facility they use only meets some of their needs.
- The top four features individuals that use facilities would like to see in a Jefferson City indoor multi-use recreation facility are:
  - Indoor Running/Walking Track – 57.3%
  - Weight Room/Cardio Equipment – 52.4%
  - Indoor Aquatics/Swimming – 39.0%
  - Aerobics/Fitness/Dance/Yoga/Pilates – 31.1%
- The top four aquatic features individuals that use facilities are most interested in are:
  - Lazy River – 44.5%
  - Hot Tub Area – 34.1%
  - Water Slides – 33.5%
  - Lap Lanes – 32.3%
- If Jefferson City operated an indoor multi-use recreation facility the majority of individuals that use facilities would frequent the facility at least once per week.
- The majority of individuals that use facilities feel the cost for operating a new indoor multi-use recreation facility should come through user fees.
- The majority of individuals that use facilities preferred way of paying for a facility would be through some type of annual pass or a per visit fee basis.
- The three groups individuals that use facilities felt were “very important” to serve through an indoor multi-use recreation facility were:
  - Families – 75.6%
  - Grade School Age Children – 62.2%
  - Teenagers – 54.5%

- 
- The majority of individuals that use facilities felt that Jefferson City Parks and Recreation services and facilities ranked about the same importance as other City services and facilities for the quality of life in Jefferson City.
  - The top four projects individuals that use facilities feel would have the greatest impact on making Jefferson city an attractive place to live work and play are:
    - Build Indoor Multi-Use Recreation Center – 67.1%
    - Continue Implementation of Greenway Trail Master Plan – 61.0%
    - Outdoor Playground Rehabilitation – 46.3%
    - Develop more Small Neighborhood Parks – 40.9%
  - The majority of individuals that use facilities feel the quality and variety of programs offered by Jefferson City Parks and Recreation are about the same to above average when compared to other service providers in Jefferson City.
  - The majority of individuals that use facilities feel that the development of a new indoor multi-use recreation facility is a medium to high priority when compared to the other issues Jefferson City is facing.

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### **Individuals that Do Not Use Facilities**

- The top four features individuals that do not use facilities would like to see in a Jefferson City indoor multi-use recreation facility are:
  - Indoor Running/Walking Track – 47.7%
  - Indoor Aquatics/Swimming – 32.2%
  - Weight Room/Cardio Equipment – 28.9%
  - Performing Arts Center – 25.5%
  
- The top four aquatic features individuals that do not use facilities are most interested in are:
  - Lazy River – 36.9%
  - Are for Water Exercise – 31.5%
  - Leisure Pool & Warm Water Area – 29.5%
  
- If Jefferson City operated an indoor multi-use recreation facility the majority of individuals that do not use facilities would frequent the facility at least a few times a month.
  
- The majority of individuals that do not use facilities feel the cost for operating a new indoor multi-use recreation facility should come through user fees.
  
- The majority of individuals that do not use facilities preferred way of paying for a facility would be through some type of annual pass or a per visit fee basis.
  
- The three groups individuals that do not use facilities felt were “very important” to serve through an indoor multi-use recreation facility were:
  - Families – 66.7%
  - Grade School Age Children – 52.1%
  - Teenagers – 51.4%
  
- The majority of individuals that do not use facilities felt that Jefferson City Parks and Recreation services and facilities ranked about the same to less importance as other City services and facilities for the quality of life in Jefferson City.
  
- The top four projects individuals that do not use facilities feel would have the greatest impact on making Jefferson city an attractive place to live work and play are:
  - Build Indoor Multi-Use Recreation Center – 54.4%
  - Continue Implementation of Greenway Trail Master Plan – 45.6%
  - Develop more Small Neighborhood Parks – 42.3%
  - Outdoor Playground Rehabilitation – 38.3%



## PUBLIC INPUT PROCESS

*Jefferson City, MO*

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- The majority of individuals that do not use facilities feel the quality and variety of programs offered by Jefferson City Parks and Recreation are about the same to above average when compared to other service providers in Jefferson City.
- The majority of individuals that do not use facilities feel that the development of a new indoor multi-use recreation facility is a medium to high priority when compared to the other issues Jefferson City is facing.

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### Households with Less than \$25,000 Annual Income

- The majority of households with less than \$25,000 annual income are not using any indoor recreation, sports or fitness facilities.
- The three indoor recreation, sports and fitness facilities households with less than \$25,000 annual income frequent most often are;
  - YMCA – 85.7%
  - Jefferson City Parks & Recreation, Churches w/ Recreational Facilities & Private Fitness Clubs – 28.6%
- For households with less than \$25,000 annual income the majority say that the current facility they use meets all of their needs.
- The top four features households with less than \$25,000 annual income would like to see in a Jefferson City indoor multi-use recreation facility are:
  - Indoor Running/Walking Track – 43.8%
  - Weight Room/Cardio Equipment – 40.6%
  - Indoor Aquatics/Swimming – 25.0%
  - Aerobics/Fitness/Dance/Yoga/Pilates – 21.9%
- The top four aquatic features households with less than \$25,000 annual income are most interested in are:
  - Lazy River – 34.4%
  - Area for Swim Lessons – 31.3%
  - Leisure Pool – 28.1%
  - Hot Tub Area & Dry Sauna – 25.0%
- If Jefferson City operated an indoor multi-use recreation facility the majority of households with less than \$25,000 annual income would frequent the facility at least a few times per month.
- The households with less than \$25,000 annual income are split on whether the cost for operating a new indoor multi-use recreation facility should come through user fees or be supported through tax dollars.
- The majority of households with less than \$25,000 annual income preferred way of paying for a facility would be through some type of annual pass or a per visit fee basis.

- 
- The three groups households with less than \$25,000 annual income felt were “very important” to serve through an indoor multi-use recreation facility were:
    - Families – 86.2%
    - Grade School Age Children – 76.7%
    - Disabled Participants – 76.7%
  
  - The majority of households with less than \$25,000 annual income felt that Jefferson City Parks and Recreation services and facilities ranked about the same to more important as other City services and facilities for the quality of life in Jefferson City.
  
  - The top four projects households with less than \$25,000 annual income feel would have the greatest impact on making Jefferson city an attractive place to live work and play are:
    - Build Indoor Multi-Use Recreation Center – 53.1%
    - Develop more Small Neighborhood Parks – 53.1%
    - Outdoor Playground Rehabilitation – 46.9%
    - Continue Implementation of Greenway Trail Master Plan – 31.3%
  
  - The majority of households with less than \$25,000 annual income feel the quality and variety of programs offered by Jefferson City Parks and Recreation are about the same to above average when compared to other service providers in Jefferson City.
  
  - The majority of households with less than \$25,000 annual income feel that the development of a new indoor multi-use recreation facility is a medium to high priority when compared to the other issues Jefferson City is facing.

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### Households with More than \$100,000 Annual Income

- The majority of households with more than \$100,000 annual income are using indoor recreation, sports or fitness facilities.
- The three indoor recreation, sports and fitness facilities households with more than \$100,000 annual income frequent most often are;
  - YMCA – 61.9%
  - Jefferson City Parks & Recreation – 38.1%
  - Public School District – 31.0%
- For households with more than \$100,000 annual income the majority say that the current facility they use meets some of their needs.
- The top four features households with more than \$100,000 annual income would like to see in a Jefferson City indoor multi-use recreation facility are:
  - Indoor Running/Walking Track – 63.9%
  - Indoor Aquatics/Swimming – 49.2%
  - Weight Room/Cardio Equipment – 47.5%
  - Aerobics/Fitness/Dance/Yoga/Pilates – 29.5%
- The top four aquatic features households with more than \$100,000 annual income are most interested in are:
  - Lazy River – 47.5%
  - Area for Water Exercise – 42.6%
  - Water Slides – 37.7%
  - Lap Lanes – 32.8%
- If Jefferson City operated an indoor multi-use recreation facility the majority of households with more than \$100,000 annual income would frequent the facility at least a few times per month.
- The majority of households with more than \$100,000 annual income feel the cost for operating a new indoor multi-use recreation facility should come through user fees.
- The majority of households with more than \$100,000 annual income preferred way of paying for a facility would be through an annual pass.

- 
- The three groups households with more than \$100,000 annual income felt were “very important” to serve through an indoor multi-use recreation facility were:
    - Teenagers – 85.1%
    - Families – 81.0%
    - Grade School Age Children – 69.0%
  
  - The majority of households with more than \$100,000 annual income felt that Jefferson City Parks and Recreation services and facilities ranked about the same importance as other City services and facilities for the quality of life in Jefferson City.
  
  - The top four projects households with more than \$100,000 annual income feel would have the greatest impact on making Jefferson city an attractive place to live work and play are:
    - Build Indoor Multi-Use Recreation Center – 67.2%
    - Continue Implementation of Greenway Trail Master Plan – 65.6%
    - Develop more Small Neighborhood Parks – 44.3%
    - Outdoor Playground Rehabilitation – 39.3%
  
  - The majority of households with more than \$100,000 annual income feel the quality and variety of programs offered by Jefferson City Parks and Recreation are about the same to above average when compared to other service providers in Jefferson City.
  
  - The majority of households with more than \$100,000 annual income feel that the development of a new indoor multi-use recreation facility is a medium to high priority when compared to the other issues Jefferson City is facing.

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## Households with Children Under 10

- The majority of households with children under 10 are using indoor recreation, sports or fitness facilities.
- The three indoor recreation, sports and fitness facilities households with children under 10 frequent most often are;
  - YMCA – 70.7%
  - Jefferson City Parks & Recreation – 43.1%
  - Public School District – 22.4%
- For households with children under 10 the majority say that the current facility they use meets some of their needs.
- The top four features households with children under 10 would like to see in a Jefferson City indoor multi-use recreation facility are:
  - Indoor Running/Walking Track – 50.6%
  - Weight Room/Cardio Equipment – 49.4%
  - Interactive Playground for Kids – 47.2%
  - Indoor Aquatics – 42.7%
- The top four aquatic features households with children under 10 are most interested in are:
  - Water Sprays – 57.3%
  - Water Slides – 52.8%
  - Lazy River – 52.8%
  - Area for Swim Lessons – 34.8%
- If Jefferson City operated an indoor multi-use recreation facility the majority of households with children under 10 would frequent the facility several times a month.
- The majority of households with children under 10 feel the cost for operating a new indoor multi-use recreation facility should come through user fees.
- The majority of households with children under 10 preferred way of paying for a facility would be through an annual family pass.

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- The three groups households with children under 10 felt were “very important” to serve through an indoor multi-use recreation facility were:
    - Families – 81.6%
    - Grade School Age Children – 69.0%
    - Teenagers – 63.2%
  
  - The majority of households with children under 10 felt that Jefferson City Parks and Recreation services and facilities ranked about the same importance as other City services and facilities for the quality of life in Jefferson City.
  
  - The top four projects households with children under 10 feel would have the greatest impact on making Jefferson city an attractive place to live work and play are:
    - Build Indoor Multi-Use Recreation Center – 78.7%
    - Outdoor Playground Rehabilitation – 58.4%
    - Continue Implementation of Greenway Trail Master Plan – 53.9%
    - Develop more Small Neighborhood Parks – 50.6%
  
  - The majority of households with children under 10 feel the quality and variety of programs offered by Jefferson City Parks and Recreation are about the same to above average when compared to other service providers in Jefferson City.
  
  - The majority of households with children under 10 feel that the development of a new indoor multi-use recreation facility is a medium to high priority when compared to the other issues Jefferson City is facing.

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### Households with Individuals Age 10-19

- The majority of households with individuals age 10-19 are using indoor recreation, sports or fitness facilities.
- The three indoor recreation, sports and fitness facilities households with individuals age 10-19 frequent most often are;
  - YMCA – 67.7%
  - Public School District – 32.3%
  - Jefferson City Parks & Recreation – 29.0%
- For households with individuals age 10-19 the majority say that the current facility they use meets some of their needs.
- The top four features households with individuals age 10-19 would like to see in a Jefferson City indoor multi-use recreation facility are:
  - Indoor Running/Walking Track – 64.2%
  - Indoor Aquatics – 47.2%
  - Weight Room/Cardio Equipment – 43.4%
  - Gymnasium – 28.3%
- The top four aquatic features households with individuals age 10-19 are most interested in are:
  - Lazy River – 45.3%
  - Hot Tub Area – 39.6%
  - Leisure Pool & Warm Water Area – 35.8%
- If Jefferson City operated an indoor multi-use recreation facility the majority of households with individuals age 10-19 would frequent the facility at least a few times a month.
- The majority of households with individuals age 10-19 feel the cost for operating a new indoor multi-use recreation facility should come through user fees.
- The majority of households with individuals age 10-19 preferred way of paying for a facility would be through an annual family pass.

- 
- The three groups households with individuals age 10-19 felt were “very important” to serve through an indoor multi-use recreation facility were:
    - Families – 73.1%
    - Grade School Age Children – 61.5%
    - Teenagers – 55.8%
  
  - The majority of households with individuals age 10-19 felt that Jefferson City Parks and Recreation services and facilities ranked about the same importance as other City services and facilities for the quality of life in Jefferson City.
  
  - The top four projects households with individuals age 10-19 feel would have the greatest impact on making Jefferson city an attractive place to live work and play are:
    - Build Indoor Multi-Use Recreation Center & Continue Implementation of Greenway Trail Master Plan – 62.3%
    - Outdoor Playground Rehabilitation – 41.5%
    - Develop more Small Neighborhood Parks, Replace Washington Park Tennis Courts, Renovate Washington Park Ice Arena – 32.1%
  
  - The majority of households with individuals age 10-19 feel the quality and variety of programs offered by Jefferson City Parks and Recreation are about the same to above average when compared to other service providers in Jefferson City.
  
  - The majority of households with individuals age 10-19 feel that the development of a new indoor multi-use recreation facility is a medium to high priority when compared to the other issues Jefferson City is facing.

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## Seniors

- The majority of seniors are not using indoor recreation, sports or fitness facilities.
- The three indoor recreation, sports and fitness facilities seniors frequent most often are;
  - Private Fitness Clubs – 38.2%
  - YMCA – 35.3%
  - Other – 23.5%
- For seniors the majority say that the current facility they use meets all of their needs.
- The top four features seniors would like to see in a Jefferson City indoor multi-use recreation facility are:
  - Indoor Running/Walking Track – 48.2%
  - Senior Citizen Area – 36.5%
  - Performing Arts Center – 31.8%
  - Weight Room/Cardio Equipment – 28.2%
- The top four aquatic features seniors are most interested in are:
  - Warm Water Area & Area for Water Exercise – 40.0%
  - Leisure Pool & Lazy River – 24.7%
- If Jefferson City operated an indoor multi-use recreation facility the majority of seniors would frequent the facility at least a few times a month.
- The majority of seniors feel the cost for operating a new indoor multi-use recreation facility should come through user fees.
- The majority of seniors preferred way of paying for a facility would be through an annual adult pass or pay per visit.
- The three groups seniors felt were “very important” to serve through an indoor multi-use recreation facility were:
  - Families – 57.7%
  - Disabled Participants – 51.9%
  - Senior Adults – 46.9%
- The majority of seniors felt that Jefferson City Parks and Recreation services and facilities ranked about the same importance to more important as other City services and facilities for the quality of life in Jefferson City.

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- The top four projects seniors feel would have the greatest impact on making Jefferson city an attractive place to live work and play are:
    - Continue Implementation of Greenway Trail Master Plan – 50.6%
    - Build Indoor Multi-Use Recreation Center – 45.9%
    - Develop more Small Neighborhood Parks – 36.5%
    - Outdoor Playground Rehabilitation – 34.1%
  
  - The majority of seniors feel the quality and variety of programs offered by Jefferson City Parks and Recreation are about the same to above average when compared to other service providers in Jefferson City.
  
  - The majority of seniors feel that the development of a new indoor multi-use recreation facility is a medium to low priority when compared to the other issues Jefferson City is facing.

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### **Residents of Jefferson City for 20+ Years**

- The residents of Jefferson City for 20+ years are split evenly between those who use and those who do not use indoor recreation, sports or fitness facilities.
- The three indoor recreation, sports and fitness facilities residents of Jefferson City for 20+ years frequent most often are;
  - YMCA – 57.3%
  - Jefferson City Parks & Recreation – 27.0%
  - Private Fitness Club – 25.8%
- For residents of Jefferson City for 20+ years the majority say that the current facility they use meets all of their needs.
- The top four features residents of Jefferson City for 20+ years would like to see in a Jefferson City indoor multi-use recreation facility are:
  - Indoor Running/Walking Track – 51.4%
  - Weight Room/Cardio Equipment – 40.9%
  - Indoor Aquatics – 30.4%
  - Performing Arts Center – 23.8%
- The top four aquatic features residents of Jefferson City for 20+ years are most interested in are:
  - Lazy River – 40.9%
  - Warm Water Area – 32.0%
  - Area for Water Exercise – 31.5%
  - Leisure Pool – 25.4%
- If Jefferson City operated an indoor multi-use recreation facility the majority of residents of Jefferson City for 20+ years would frequent the facility at least a few times a month.
- The majority of residents of Jefferson City for 20+ years feel the cost for operating a new indoor multi-use recreation facility should come through user fees.
- The majority of residents of Jefferson City for 20+ years preferred way of paying for a facility would be through an annual pass or per visit.

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- The three groups residents of Jefferson City for 20+ years felt were “very important” to serve through an indoor multi-use recreation facility were:
    - Families – 64.1%
    - Grade School Age Children – 55.9%
    - Disabled Participants – 54.4%
  
  - The majority of residents of Jefferson City for 20+ years felt that Jefferson City Parks and Recreation services and facilities ranked about the same importance to more important as other City services and facilities for the quality of life in Jefferson City.
  
  - The top four projects residents of Jefferson City for 20+ years feel would have the greatest impact on making Jefferson city an attractive place to live work and play are:
    - Build Indoor Multi-Use Recreation Center – 55.8%
    - Continue Implementation of Greenway Trail Master Plan – 54.1%
    - Outdoor Playground Rehabilitation – 39.8%
    - Develop more Small Neighborhood Parks – 39.2%
  
  - The majority of residents of Jefferson City for 20+ years feel the quality and variety of programs offered by Jefferson City Parks and Recreation are about the same to above average when compared to other service providers in Jefferson City.
  
  - The majority of residents of Jefferson City for 20+ years feel that the development of a new indoor multi-use recreation facility is a medium to low priority when compared to the other issues Jefferson City is facing.

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### Residents of Jefferson City for Less Than 5 Years

- The majority of residents of Jefferson City for less than 5 years do use indoor recreation, sports or fitness facilities.
- The three indoor recreation, sports and fitness facilities residents of Jefferson City for less than 5 years frequent most often are;
  - YMCA – 65.0%
  - Jefferson City Parks & Recreation – 50.0%
  - Private Fitness Club – 25.0%
- For residents of Jefferson City for less than 5 years the majority say that the current facility they use meets all of their needs.
- The top four features residents of Jefferson City for less than 5 years would like to see in a Jefferson City indoor multi-use recreation facility are:
  - Indoor Aquatics – 50.0%
  - Weight Room/Cardio Equipment – 47.4%
  - Indoor Running/Walking Track – 44.7%
  - Interactive Playground for Kids & Aerobics/Fitness/Dance/Yoga/Pilates – 34.2%
- The top four aquatic features residents of Jefferson City for less than 5 years are most interested in are:
  - Lazy River – 39.5%
  - Leisure Pool & Warm Water Area – 36.8%
  - Lap Lanes – 34.2%
- If Jefferson City operated an indoor multi-use recreation facility the majority of residents of Jefferson City for less than 5 years would frequent the facility several times a week.
- The majority of residents of Jefferson City for less than 5 years feel the cost for operating a new indoor multi-use recreation facility should come through user fees.
- The majority of residents of Jefferson City for less than 5 years preferred way of paying for a facility would be through an annual family pass.

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- The three groups residents of Jefferson City for less than 5 years felt were “very important” to serve through an indoor multi-use recreation facility were:
    - Families – 86.1%
    - Grade School Age Children & Disabled Participants – 61.1%
  - The majority of residents of Jefferson City for less than 5 years felt that Jefferson City Parks and Recreation services and facilities ranked about the same importance to more important as other City services and facilities for the quality of life in Jefferson City.
  - The top four projects residents of Jefferson City for less than 5 years feel would have the greatest impact on making Jefferson city an attractive place to live work and play are:
    - Build Indoor Multi-Use Recreation Center – 68.4%
    - Outdoor Playground Rehabilitation – 52.6%
    - Develop more Small Neighborhood Parks – 52.6%
    - Continue Implementation of Greenway Trail Master Plan – 50.0%
  - The majority of residents of Jefferson City for less than 5 years feel the quality and variety of programs offered by Jefferson City Parks and Recreation are about the same to above average when compared to other service providers in Jefferson City.
  - The majority of residents of Jefferson City for less than 5 years feel that the development of a new indoor multi-use recreation facility is a medium to high priority when compared to the other issues Jefferson City is facing.

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### **Section III – Partnership Assessment**

An optional service in the scope of services provided to Jefferson City Parks & Recreation was to conduct a partnership assessment. Jefferson City Parks & Recreation has chosen to move forward on that option and have Ballard\*King & Associates conduct a partnership assessment where information is gathered through meeting with potential partners in the community.

This section outlines the findings from the partnership meetings and details the conversations which took place with the various attendees of the meetings. It is important to note that Bill Lockwood, Director of Parks, Recreation and Forestry in Jefferson City also conducted some additional partnership meetings. Those conversations and subsequent conversations have not been factored into this document.

The partnership meetings that B\*K facilitated involved the following groups:

- YMCA of Jefferson City
- St. Mary's Hospital
- Cole County
- Capital Region Hospital
- Jefferson City Library
- Lincoln University

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A general comment that can be made of all of the groups that B\*K visited with is that there seemed to be a general interest in partnering with Jefferson City in pursuit of an indoor multi-use recreation facility. That level of interest can be summarized in the following fashion.

*YMCA of Jefferson City* – Interested in partnership on multiple levels. Depending on the facility program they could be invested as a capital partner or a renter of space for their current programming needs. The concept of pursuing a joint indoor aquatic facility was very appealing. They do have reservations about another fitness provider entering the current market. It should be noted that the long range plan for their West location is to include indoor aquatics on some level.

*St. Mary's Hospital* – Of the partner meetings Ballard\*King was involved with, this was the most intriguing. The inclusion of a comprehensive indoor multi-use recreation facility is of interest to St. Mary's for the opportunities it would provide them and their current rehabilitation offerings. They would not be able to bring capital dollars to the project, but would be interested in a long term lease of space. While this presents challenges to the upfront construction cost it also provides a revenue stream in two instances; one a significant renter of space in the facility, two a funnel of potential members through an employee wellness program. Another interesting note to this potential partner is that there is not a location requirement tied to their partnership, in other words, a facility does not have to be located on their campus.

*Cole County* – The inclusion of a recreation center in the recently completed study commissioned by Cole County caught all involved by surprise. This is not a service that Cole County has ever anticipated providing to the residents. Cole County does have the potential to provide some upfront capital dollars for construction and regardless of their involvement level see themselves being a strong supporter of the concept. Cole County's financial involvement would be eliminated with the involvement of a Private Provider on an ownership level.

*Capital Region Hospital* – Of the partner meetings that Ballard\*King was involved with, this was the group that appeared least interested in a partnership opportunity. This lack of interest can be attributed to the fact that they currently have their own facility, HealthPlex. They were concerned with another provider entering what they feel is a "tight" market. However, they would be a supporter of a facility that continued to enhance the overall wellness of the community. They could be a potential partner of wellness programs to the community, but significant involvement of St. Mary's may negate that potential.

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*Jefferson City Library* – The Library is approaching a point in their own history where they need to make some decisions about their future and the potential of expanding their current facilities and offerings to the community at large. If the Library were to build a new central location that met all of their square footage needs their involvement would be on a book drop and/or programmatic level only. However, if they are to pursue a branch concept within the community a significant physical presence in an indoor multi-use recreation facility would be of interest. Regardless of the direction they choose to pursue, it will require a vote by the community to increase funding for construction and/or operation. Such an increase in funding has not occurred since the 1960s. There could be a unique synergy gain via foot traffic into a combination recreation library facility and such a facility does exist in Richmond Heights, MO.

*Lincoln University* – Lincoln University is in an interesting position in that they are interested in a potential partnership, but there are obstacles preventing that partnership. The main obstacle is the student body in that the University wants a recreation facility to be an initiative of the students and the cyclical nature of a campus makes that challenging. The additional challenge of the student body is that they appear to be unwilling to “travel” to a location that is not on campus. Currently Lincoln University students can take advantage of the nearby YMCA, however very few individuals do so because of location. Two important pieces of information that were gathered in this meeting were that: 1) the collection of money that they have for a new aquatic facility is nowhere near what was assumed by community members, 2) that the athletic department at Lincoln is trying to begin a capital campaign for new facilities.

The overwhelming opinion of current fitness providers in the community is that they are nervous about Jefferson City entering that market because they feel there is a finite number of participants. However, they do acknowledge that there is a segment of the population that they are unable to reach due to financial restrictions. To that end it also must be remembered that the Primary Service Area for an indoor multi-use recreation facility would reach far beyond Jefferson City boundaries proper.

As Jefferson City Parks & Recreation continues to move forward in this effort of an indoor multi-use recreation facility it will be important for them to continue to engage some, if not all, of these potential partners. The ability to keep these potential partners in the conversation and up to-date with current information will further strengthen the ability to negotiate future partnership opportunities.

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**January 5 – Jefferson City YMCA**

*Comments:*

- There is a general interest from the YMCA in partnering with Jefferson City on a facility.
- It is difficult at this time for them to determine the level of interest because a proposed Jefferson City facility is so ambiguous.
- The YMCA's interest in partnership opportunities will continue as long as the proposed facility would promote the mission of the YMCA.
- General interest in sharing of the information gathered in this study.
- The West Family facility is not a complete facility, with the next addition to that facility being a gymnasium and an aquatic facility.
- Gymnasium would look to be larger than the existing gym for programming purposes and for the inclusion of an elevated track.
- In terms of an aquatic facility they would look to incorporate something with a leisure focus.
- The YMCA will typically look to raise 2/3 of the facility cost internally and then campaign for the remaining 1/3.
- Does not feel that there is animosity towards Jefferson City Parks & Recreation, but acknowledges that did exist at one time.
- In order for a partnership between the YMCA and Parks & Recreation Department to move forward there is a 25 member board that needs to be involved.
  
- Jefferson City Parks & Recreation including any type of fitness component in a new facility would be cause for concern on the part of the YMCA.
- There is not necessarily a management requirement of the facility on the part of the YMCA for their involvement in a partnership.
- The concept of a capital contribution to construction of a facility is not out of the question.
- An annual contribution from the YMCA to offset membership is not out of the question.
  
- Soccer was a program that was discussed with the YMCA and while it was once a very large program for the Y, they have seen their numbers remain static and even trend downward. This is due in large part to the private soccer clubs in town. This points to the market for this particular activity but also to a potential renter of space if indoor turf was included in a Jefferson City facility.

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**January 5 – St. Mary’s Hospital**

*Comments:*

- St. Mary’s is moving forward with a new “campus” location on 110 acres.
- This is the second time this concept has moved forward, the first time St. Mary’s had engaged the YMCA to see if there was an interest to locate a new facility on that property. Since those initial conversations the West YMCA facility has been developed.
- St. Mary’s is very interested in a partnership with the City in regards to an indoor multi-use recreation facility.
- On their new campus St. Mary’s intends to connect into the Jefferson City Greenway and incorporate some park space into the campus.
- They would like the Jefferson City facility to be completely comprehensive; Webster Groves and Des Peres facilities were mentioned as benchmarks.
- Acreage would be a negotiation between St. Mary’s and Jefferson City in terms of number of acres and cost.
- Facility use by St. Mary’s would be multiple fold, in concept:
  - Cardiac and other general rehabilitation services with transition into membership.
  - Employee wellness program.
  - Fitness & Wellness program opportunities for the community at large.
  - Additional meeting space for on-campus conferencing.
- Facility items that St. Mary’s would be interested in:
  - A minimum of 2,500 square feet.
  - This area would be staffed by St. Mary’s
  - There would not be general public access to the area.
  - Equipment would be more cardiovascular in nature.
  - Incorporation of small assessment room(s) would be of interest
- The close proximity, on campus, of an indoor multi-use recreation facility is very appealing to St. Mary’s but if the facility was not on their campus it would not be a deal breaker.
- Requirement of a capital contribution from St. Mary’s would be a deal breaker. They would look at a partnership strictly as a business transaction. Jefferson City would provide the space, St. Mary’s would enter into a long term, market based lease of said space.
- A lack of consistency with St. Mary’s overall campus plan could be a deal breaker.
- Infrastructure requirements would need to be a topic of conversation and how those were negotiated.
- The current plan is for construction to begin sometime in 2012 with completion in 2015. At this time St. Mary’s is not 100% committed, but the bulk of the pieces are in place.

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**January 11 – Cole County Commissioner**

*Comments:*

- Most counties are first class counties, meaning they have planning and zoning.
- Cole County only has planning, but they are moving toward zoning.
- The resulting study, where a potential recreation facility was outlined, is a step towards the inclusion of zoning.
  
- The bulk of Cole County, in particular outside of Jefferson City proper is unincorporated.
- The ½ Cent Local Parks Sales Tax eliminated the Resident/Non-Resident fee structure for Jefferson City facilities and programs and this has been widely embraced by residents of the County.
  
- The County has a ½ Cent Sales Tax for Capital Improvements
  - 85% of that ½ Cent goes towards roads and infrastructure improvements
  - 15% goes to County Buildings/Needs/CIP. Example; from this 15% the County provided \$300,000 to a new Animal Shelter in Jefferson City. Primary reason being that the County Animal Control Officer uses this facility in their job.
  - This 15% would be a potential capital contribution source for a new indoor multi-use recreation facility.
  
- The County has not gotten heavily involved in Parks & Recreation and to that end the current County Parks Department is 1 person and his primary responsibility is mowing, not providing programs and services.
- The County currently offers 3 parks, but there is no future plans to add significant acreage.
- In a new facility the inclusion of multi-purpose meeting space would be important along with the inclusion of an adjacent kitchen. More of a full-service kitchen as opposed to a warming/catering kitchen.
  
- If the YMCA is involved on an ownership/operational level the County will not be involved. This does not just apply to the YMCA, but any private venture partner that was involved on that level.
- The County is ambivalent as it relates to the location of an indoor multi-use recreation facility.

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**January 11 – Capital Region Medical**

*Comments:*

- Capital Region Medical operates their own fitness facility, the Healthplex. This facility was the result of a study they completed 7-8 years ago.
- Healthplex currently has been 2,000-3,000 members and this is comprised of the general public and employees of Capital Region Medical.
  - Facility is used for; Cardiac Rehab, PT, OT, Diabetes Management, etc.
- The facility was not designed to accommodate any teen or family fitness.
- They currently do have the ability to accommodate more, incorporate more, group fitness programs.
- Since their expansion of the facility the median age of their users has dropped.
- They provide the Les Mills group exercises program.
- They currently work with the community Health Department to provide community outreach and programming.
  
- There was a general lack of interest from this group as it related to the idea of a partnership. However, they do want to be supportive of anything that “improves the health and wellness of the community at large.”
- They know that there are markets which are not being served, underprivileged, minority groups and others. They don’t foresee being able to reach those groups.
- Like the YMCA they were very apprehensive about the inclusion of any fitness component in a Jefferson City facility.

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**January 11 – Jefferson City Library**

*Comments:*

- The Jefferson City Library is already a partner with Jefferson City Parks & Recreation in regards to the programs that they offer the community at large.
- Library expansion is a discussion topic and is something on the horizon for the organization.
- This discussion of expansion has also prompted discussion of 1 new large facility v. a branch concept.
- Because of funding it would require a vote of the residents to make new construction happen.
- 90-95% of their funding comes from property taxes.
- The library has not had a levy increase since 1964.
  
- Current facility is 38,000 square feet with an 8,000 square feet annex. Additionally there is a 4,000 square feet facility in Osage County.
- In a new facility, one stand alone facility, the Library would like to see 75,000 square feet.
  - Expanded Computer Lab Space.
  - General Programming Space.
  - Teen Space – very successful in the current location, due in large part to the Teen Librarian.
  - WIFI
  
- This group has a keen interest in partnering with Jefferson City Parks & Recreation in a new facility.
- If this were to take place they would see it being more of a branch library added on to an indoor multi-use recreation facility.
- Both organizations would benefit from the foot traffic the other creates.
- The Library would like to have some type of presence at a new facility even if it was as miniscule as a book drop or a kiosk center in association with locker book pick-up.
  
- Ideally the library would like an ownership role, but they are not above leasing space.

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**March 22 – Lincoln University**

*Comments:*

- Gymnasium Space – Physical Education, Athletics, Students (priority use)
  - Open gym space was running from 10:00P-Midnight.
  - Intramurals would use 2 cross courts
  - Weight room – 30 hours per week for students, evening hours
    - Some cardio equipment is located in the various residential halls
  - Soccer/practice football field, asphalt track – free use to the public
  - Stadium itself is not open to the general public use, this also has all weather track
  - Baseball and softball fields, not available to the public, rental rates are high
  - Tennis courts were built with DNR funds, available for public use
  - They have grown out of the current facility for indoor graduation and it is inadequate
  - Looking at a 7,000 seat arena, indoor track, indoor football practice facility
  - 8-lane bowling facility in the student union
  - If students are from outside of 60 miles students are required to reside on campus for 4 semesters
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- Capacity of 1,000 students on campus, right now around 750
  - Students are interested in more gymnasium time, drop-in basketball
  - Tried to supplement with outdoor courts, but proximity is an issue.
  - Indoor running track is a priority, traditional 6-lane 200M indoor running track
    - November – March is indoor season
    - March – May outdoor season
    - Compliment of field activities as well
  - No swim classes, water classes, or any type and those have gone to the YMCA
  - The students are interested in a student recreation facility
  - There were only 3 years where individuals have paid into a “pool fund”
  - Year 2000 there was a plan put together to build a pool, 8-lane 25 yard teaching pool
  - NCAA requirements for the construction of the arena
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- The YMCA has a reduced student rate for Lincoln University students
  - Students would want a facility on campus, or extremely close, adjacent
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- Biggest conflict will be with multiple use
  - Partnership for a more regionally geared facility that could accommodate NCAA events; basketball, volleyball, etc.

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## **Section IV – Program Statement**

The following section details program recommendations for an indoor multi-purpose recreation facility in Jefferson City. These recommendations have been formed based upon the market analysis, public input process, the statistically valid survey instrument and partnership assessment. An important note about this section:

- These are recommendations made by Ballard\*King & Associates and as such the associated square footage estimates are just that. Presenting these numbers to an architectural firm will provide the foundation by which the architect would complete a final program and begin schematic design.

In assembling this document it should be noted that there is no financial benefit to Ballard\*King & Associates based upon the direction the indoor multi-use recreation facility takes. This program statement is simply the interpretation of the data that B\*K has gathered to date from the community of Jefferson City.

Jefferson City is in a unique position as it relates to indoor facilities within the community. It is the opinion of Ballard\*King & Associates that if you look at the inventory of facilities within Jefferson City proper there is an abundance of alternative providers and the addition of a City operated facility, based upon components, may over saturate the market. However, an equally important footnote is the fact that the Jefferson City Parks, Recreation & Forestry Department serves a larger geographical area than Jefferson City proper. It is estimated by the Department that over 90% of their program participants reside within a 15-mile radius of Jefferson City. Having that information and understanding that there is a significantly greater service population, the addition of an indoor multi-use recreation facility operated by the City would not have an over saturation effect.

In meeting with various stakeholders in the Jefferson City market there is an unmet demand for indoor multi-use space. That is to say, meeting rooms, conference space, gymnasium space, etc. are difficult to secure and maintain consistent reservations within. This is further emphasized by the fact that Jefferson City's own recreation programs are many times at the mercy of other facility's schedules and priorities of use. This lack of control of facility presents significant challenges to the Department to maintain and grow current programs, let alone respond to local and National trends as it relates to programs that could utilize those types of spaces.

In developing a facility program for the Department, information gathered in the stakeholder meetings must be balanced with the citizen survey. It was no surprise that the top four activities respondents to the survey were interested in were: indoor running/walking track, weight room/cardiovascular equipment area, indoor aquatics/swimming center and aerobic/fitness/dance space. These facility components are not only consistent with the participation percentages

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developed through NSGA, but also consistent with what B\*K sees in many communities around the country. However, the information gathered in the stakeholder meetings indicated a strong interest in the development of more gymnasium space and multi-purpose meeting room space.

Some of the challenges that the Jefferson City Parks, Recreation & Forestry Department may face in the pursuit of an indoor multi-purpose recreation facility are:

- The perception that the market for these types of facilities is already being served and met by other providers in the area.
- The components that should be included in a facility if and when it is built.
- The ability to fund construction of a facility, regardless of components.
- The ability to operate and maintain a facility in a financially responsible manner.

It is with these challenges in mind that the program statement will be organized into two phases of development.

Based upon all of the information gathered to this point Ballard\*King & Associates would recommend the following program options.

Component	Phase I (sq. ft.)	Future Phase (sq. ft.)
Administrative Office Space	500	3,500
Lobby	1,000	500
Gymnasium Space (2)	29,000	
Indoor Running/Jogging Track	-	7,500
Restrooms/Changing Facilities	1,500	-
Multi-Purpose Meeting Rooms	-	4,000
Warming Kitchen	-	750
Storage	1,000	500
Indoor Aquatics (leisure only) <sup>1</sup>	-	12,000
Locker Room	-	1,500
Wet Classroom(s)	-	1,000
Weight Room	-	3,500
Cardiovascular Space	-	1,500
Group Exercise	-	1,500
<b>Total Space:</b>	<b>33,000</b>	<b>37,750</b>
33% Circulation & Mechanical	10,890	12,210
<b>Total Building Size Estimate</b>	<b>43,890</b>	<b>49,210</b>
<b>Total Building Cost Estimate</b>	<b>\$8,778,000</b>	<b>\$11,342,000</b>

	Square Feet	Percentage	Potential Construction Cost <sup>2</sup>
Phase I	43,890	47.1%	\$8,778,000
Future Phase	49,210	52.9%	\$11,342,000
<b>Total:</b>	<b>93,100</b>	<b>100%</b>	<b>\$20,120,000</b>

<sup>1</sup> The square footage allocation refers to indoor aquatics only.

<sup>2</sup> Construction Cost refers simply to the cost for construction of the structure. This does not look at total project cost which would include land acquisition, FFE, contingency and architectural fees.

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**Phase Descriptions:**

Phase I is a clear focus for the Department to control their own destiny as it relates to some of the programming that they are currently offering off-site. It also aligns the program components with the current political support within the City administration. It is important to note that the square footage for gymnasium would not allow the Department to house all of their programs under one roof. If housing all programs utilizing gymnasium space was a primary goal, B\*K would recommend increasing the gymnasium space allocation. Such an increase in gymnasium square feet and overall facility size would create an increase in initial capital investment. Phase I as illustrated on the previous page should allow the department to increase program offerings and program fees. Phase I would not allow the Department to charge a membership of any type, however as the Department has a pay-to-play philosophy in place a nominal daily admission fee will be reflected in the Operational Performance Indicator Analysis (OPiA) report. The primary sources of revenue for this facility would be daily admission rates and/or punch card systems along with facility rentals and program fees.

Future Phase would allow the Department to house most, if not all, of their programs under one roof. This phase also assumes that one of the two current outdoor pools would cease to exist and that outdoor facility would be replaced with an indoor year around leisure pool. The pool would increase the overall operation cost of Future Phase but the addition of these components would allow the Department to: enhance daily admission rates and/or punch card systems, increase facility rentals and program fees and allow for the implementation of a membership fee. It should be noted that based upon changes that may be made to indoor aquatic facility construction, specifically HVAC, the cost of an indoor pool may increase to a point where it is not feasible. In that case it would be the recommendation of B\*K to locate a new outdoor pool at this location.

The addition of weight and cardiovascular space and equipment would allow the Department to expand into a completely new program offering through fitness and wellness. It would also further enhance the ability of the Department to implement and/or increase a membership fee for the facility.

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These phases and the order of implementation for components are at the discretion of the Department. However, based upon the goals of the Department there could be a significant impact as to the order in which the various phases are implemented. For instance:

- Priority: house all current “court use” programs in house. Result: it would be necessary to increase the gymnasium space to approximately 40,000 square feet (4 courts) in Phase I.
- Priority: revenue generation. Result: implement Future Phase as soon as financially feasible as those components will drive membership to the facility.
- Priority: respond to the needs/wants of the community expressed in the statistically valid survey. Result: Future Phase would need to be implemented as soon as possible, if not prior to, Phase I.

Clearly all three of these items will need to be weighed against one another in the overall decision making process.

**Component Comparison by Revenue Generation and Cost to Construct:**

<b>Component</b>	<b>Phase I (sq. ft.)</b>	<b>\$200/square foot</b>	<b>Revenue Ability</b>
Administrative Office Space	500	\$100,000	Moderate
Lobby	1,000	\$200,000	Low
Gymnasium Space (3)	29,000	\$5,800,000	Moderate
Restrooms/Changing Facilities	1,500	\$300,000	Low
Storage	1,000	\$200,000	Low
<b>Total Space:</b>	<b>33,000</b>	<b>\$6,600,000</b>	
33% Circulation & Mechanical	10,890	\$2,178,000	
<b>Cost Estimate Total Building Size</b>	<b>43,890</b>	<b>\$8,778,000</b>	

<b>Component</b>	<b>Future Phase (sq. ft.)</b>	<b>\$200/square foot</b>	<b>Revenue Ability</b>
Administrative Office Space	3,500	\$700,000	Moderate
Lobby	500	\$100,000	Low
Indoor Running/Jogging Track	7,500	\$1,500,000	Moderate
Indoor Aquatics (leisure only)	12,000	\$3,900,000 <sup>3</sup>	Moderate-High
Multi-Purpose Meeting Rooms	4,000	\$800,000	Moderate
Warming Kitchen	750	\$150,000	Low
Locker Room	1,500	\$300,000	Low
Wet Classroom(s)	1,000	\$200,000	High
Weight Room	3,500	\$700,000	High
Cardiovascular Space	1,500	\$300,000	High
Group Exercise	1,500	\$300,000	High
<b>Total Space</b>	<b>37,000</b>	<b>\$8,900,000</b>	
33% Circulation & Mechanical	12,210	\$2,442,000	
<b>Cost Estimate Total Building Size</b>	<b>49,210</b>	<b>\$11,342,000</b>	

<sup>3</sup> This amount is factored @ \$325/square foot because of the structure around and mechanical within.

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**Components Description:**

**Gymnasium:** A consistent comment through the stakeholder meetings and in visiting with Department Staff is the need for more gymnasium space and more multi-use space. This is further emphasized in that many organizations within Jefferson City have looked to fulfill their own needs with the development of individual facilities. In many cases these facilities do not meet the full need of the Department and they are difficult to gain access to. As a result, a gymnasium space that can be used for a multitude of activities is recommended. While a traditional wood floor would be preferred by the competitive basketball and volleyball participant, the incorporation of a multi-purpose surface allows for other activities such as; in-line hockey, tennis and the use of this space as a trade show area.

**Indoor Walking/Jogging Track:** Exercise walking is rated as the top activity according to the National Sporting Goods Association 2009 Survey. Additionally, an elevated running/walking track was the number one item that individuals who responded to the survey said they wanted in a Jefferson City facility. Access to an indoor track becomes particularly important in the Jefferson City area during the winter months. Consequently, an elevated track around the perimeter of the gymnasium will meet the needs of several user groups. The multi-lane track allows runners, joggers and walkers to use the track simultaneously.

**Administrative Office Space:** While the Parks, Recreation & Forestry Department is already housed in their own facility the moving of those offices to a new indoor multi-use multi-purpose recreation facility would be recommended. In moving these offices to the new facility it would allow for streamlining the operation of the facility with regards to staffing. By not including a space such as this it would decrease the overall capital outlay for Phase I of construction, but it would greatly impact the day to day operating cost of the structure.

**Multi-purpose Meeting Rooms:** This was another component that was consistently discussed in stakeholder meetings and is in demand in the Jefferson City market. These spaces would need to have the ability to function as either one large space or to be sectioned into 3 separate spaces. This would allow for flexibility in programming and in rental of the spaces.

**Restrooms/Changing Facilities:** Based upon the program components in Phase I it would be B\*K's recommendation to have sufficient restroom space that included some changing areas. In this approach Phase I would not necessitate the need for showering facilities. However, showering facilities would need to be added to the point when aquatics, indoor or outdoor, is added to the site.

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**Indoor Aquatics:** The aquatic space that is outlined in this preliminary program statement refers to a space that has an emphasis on leisure aquatics. This would include things such as; zero depth entry, SCS play structure for young children, water sprays, current channels, vortex, water slide(s) and 2-4 lap lanes within the same body of water. The ability to keep the water slightly warmer, 84-86 degrees means that an older population may use the facility for aquatic exercise classes or water walking in the morning time. This temperature also allows for swim lessons of a variety of ages and abilities. An indoor leisure facility like this would become a draw for birthday parties, rentals and lock-in type events for various organizations.

**Wet Classroom:** This space is typically located in close proximity to the pool. A space such as this can be used for meetings, in-service trainings, lifeguard classes and facility wide training. Rooms such as these can also become birthday party rooms based upon need and demand and as such they have a high revenue potential.

**Weight Room / Cardiovascular Space / Group Exercise:** Weight Room and Cardiovascular Space can either be 2 completely separate areas or one large space based upon design and overall need of the community. However, group exercise needs to be its own, completely separate space from weight room and cardiovascular space. It would be B\*K's recommendation that the proposed group exercise space consists of 1 large room.

It is the opinion of Ballard\*King & Associates that the reason Weight Room/Cardiovascular Space and Group Exercise space were ranked so high in the survey is for two potential reasons.

- The current providers of these services in Jefferson City and beyond are not meeting the full need of their current memberships.
- There is a separate market of individuals that are uncomfortable with the idea of using a YMCA or a private fitness provider.

With the country as a whole facing more health-related issues because of obesity and sedentary lifestyles, weight room/cardiovascular spaces and group exercise spaces will continue to be cornerstones of public, private and non-profit facilities.

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## **Section V – Operations Performance Indicator Analysis**

Ballard\*King & Associates uses a thorough, time tested, process that is called “**Operational Performance Indicator Analysis (OPIA)**” to develop realistic operating budgets for park and recreation facilities. OPIA is a 6 step process developed by Ballard\*King and Associates to deliver a customer focused measurement tool for developing a business plan. OPIA is based on the following:

- **Step One - Determine the Important Drivers:**
- **Step Two - Fiscal Planning Approach:**
- **Step Three - Develop the Fiscal Planning Tools:**
- **Step Four - Assemble the Operational Revenue Measurements:**
- **Step Five - Assemble the Operational Expense Measurements:**
- **Step Six - Develop Project Recommendations and Management Strategy:**

When B\*K works alongside an architect, the schematic design provided is used to develop the OPIA report. In the case of Jefferson City, as B\*K is working independent of an architect the program statement in the previous section, coupled with B\*K’s working knowledge of best practices in management of indoor recreation facilities will serve as the blueprint.

It is also important to note that this document would need to be revisited once a schematic design was developed by an architect to ensure that all assumptions made within the document held true within the design process.

Based upon the information gathered to this point along with input from staff and elected officials Ballard\*King & Associates would recommend the following program options.

<b>Component</b>	<b>Phase I</b>	<b>Future Phase Options</b>
Office Space	500	3,500
Lobby	1,000	500
Gymnasium Space (3)	29,000	
Indoor Running/Jogging Track	-	7,500
Restrooms/Changing Facilities	1,500	-
Multi-Purpose Meeting Rooms	-	4,000
Warming Kitchen	-	750
Storage	1,000	500
Indoor Aquatics (leisure only) <sup>1</sup>	-	12,000
Locker Room	-	1,500
Wet Classroom(s)	-	1,000
Weight Room	-	3,500
Cardiovascular Space	-	1,500
Group Exercise	-	1,500
<b>Total Space:</b>	<b>33,000</b>	<b>37,750</b>
33% Circulation & Mechanical	10,890	12,210
<b>Total Building Size Estimate</b>	<b>43,890</b>	<b>49,210</b>
<b>Total Building Cost Estimate</b>	<b>\$8,778,000</b>	<b>\$11,342,000</b>

<sup>1</sup> The square footage allocation refers to indoor aquatics only.

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*Phase I Facility Notes:*

- Gymnasium space illustrates a space for 3 high school regulation size basketball courts. In addition this square footage allows for 15 feet of space in between the 3 courts and a 20 foot buffer surrounding the courts. In a scenario such as this if you stacked all three courts together in the same room it would require 2 divider curtains. If the courts were split into two rooms it may require as few as one. Some efficiencies can be gained in this floor plan if the boundaries between courts and the buffer surround the courts were minimized.
- Restroom/Changing facilities do not include showers in Phase I.
- Office space in Phase I refers to only necessary staff for the program operations of the building. The full Parks, Recreation & Forestry staff would not relocate until the Future Phase was added to the structure. While this is not the most efficient operation with respect to staffing it does mirror how the department operates at the Washington Park Ice Arena.

*Future Facility Notes:*

- Indoor aquatics would encompass a leisure pool that may or may not include 2-3 lap lanes depending upon need. A space such as this would also include a zero depth entry, play structure, vortex, current channel, water slide, spray features, bubble bench, etc. Additionally it would be the recommendation of B\*K to include a warm family pool as opposed to a hot tub.
- Locker rooms would accommodate the inclusion of showers into the current changing facilities and potentially the inclusion of multiple family changing spaces.
- Wet classroom would be either 1 space or a space dividable into 2 independently functioning spaces.
- Group exercise space would be 1 large group exercise space preferably with adjacent storage.

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*Operational Notes & Assumptions:*

The numbers in the following OPIA report that fall under the heading of Phase I assume that the full-time staff currently housed at 427 Monroe Street would remain at that location. Not moving the staff would mean the following in terms of operation of the new structure in Phase I.

- No new full-time administrative or programming positions would be added to the current payroll, but rather full-time staffing of the facility would be accomplished with current positions in place.
- There will be additional custodial costs with the facility.
- Additional part-time staff would be required for manning the front desk operation after normal business hours and on weekends.

It is also important to understand that the following analysis attempts to look at what the overall impact of the facility outlined in Phase I and Future Phase would be on the overall budget of the Jefferson City Parks, Recreation & Forestry Department.

In reviewing this report it should also be noted that this is a conservative approach to programming and fee structure by design. Those numbers can be either increased or decrease depending upon the financial goals of the organization. The numbers, reflected in this report are, in the opinion of Ballard\*King & Associates, attainable for the department.

**Expenditures:**

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

**Operation Cost Model:**

<b>Personnel</b>	<b>Phase I</b>	<b>Future Phase</b>
Full-Time	\$0 <sup>2</sup>	\$427,000
Part-Time	\$48,701	\$380,958
<b>TOTAL</b>	<b>\$48,701</b>	<b>\$807,958</b>

<b>Contractual</b>	<b>Phase I</b>	<b>Future Phase</b>
Employee Services	\$0	\$1,000
Communications	\$1,000	\$2,500
Contract Services	\$15,000 <sup>3</sup>	\$25,000 <sup>4</sup>
Training/Conference	\$0	\$1,500
Rental Equipment	\$1,500	\$3,500
Advertising	\$0	\$2,000
Printing	\$0	\$500
Other	\$0	\$1,000
<b>TOTAL</b>	<b>\$17,500</b>	<b>\$37,000</b>

<sup>2</sup> This plan does not include full-time custodial staff. This is something that needs to be addressed in the overall operation of the facility.

<sup>3</sup> Wood basketball courts refinished by an outside contract vendor.

<sup>4</sup> Wood basketball courts refinished by an outside contract vendor along with UV bulbs in aquatics.

Commodities	Phase I	Future Phase
Utilities <sup>5</sup>	\$109,725	\$372,400
Office Supplies	\$500	\$1,500
Food Supplies (staff)	\$0	\$750
Chemicals	\$0	\$20,000
Vending	\$5,000	\$15,000
Rental <sup>6</sup>	\$500	\$3,000
Janitorial Supplies	\$10,000	\$25,000
Program Supplies	\$500	\$2,000
First Aid Supplies	\$250	\$1,500
Uniforms	\$250	\$1,500
Maintenance/Repair Materials	\$5,000	\$15,000
Dues/License	\$0	\$750
Subscriptions	\$0	\$500
Miscellaneous	\$1,000	\$3,000
<b>TOTAL</b>	<b>\$132,725</b>	<b>\$461,900</b>

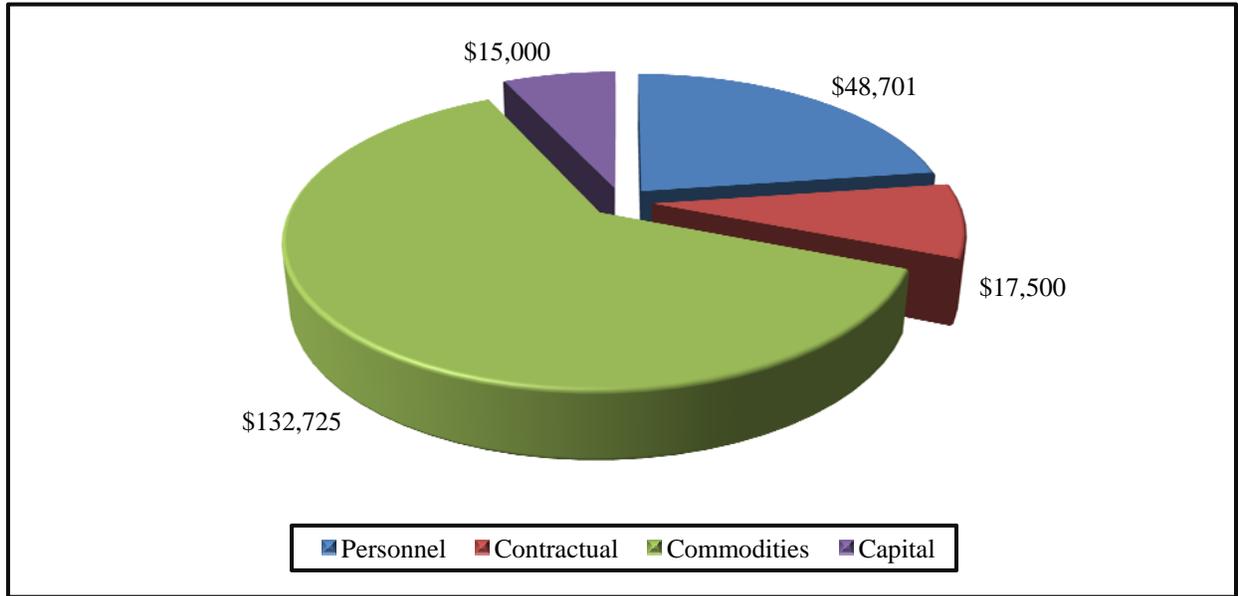
Capital	Phase I	Future Phase
Replacement Fund	\$15,000	\$50,000
<b>TOTAL</b>	<b>\$15,000</b>	<b>\$50,000</b>

All Categories	Phase I	Future Phase
Personnel	\$48,701	\$807,958
Contractual	\$17,500	\$37,000
Commodities	\$132,725	\$461,900
Capital	\$15,000	\$50,000
<b>TOTAL EXPENSE</b>	<b>\$213,926</b>	<b>\$1,356,858</b>

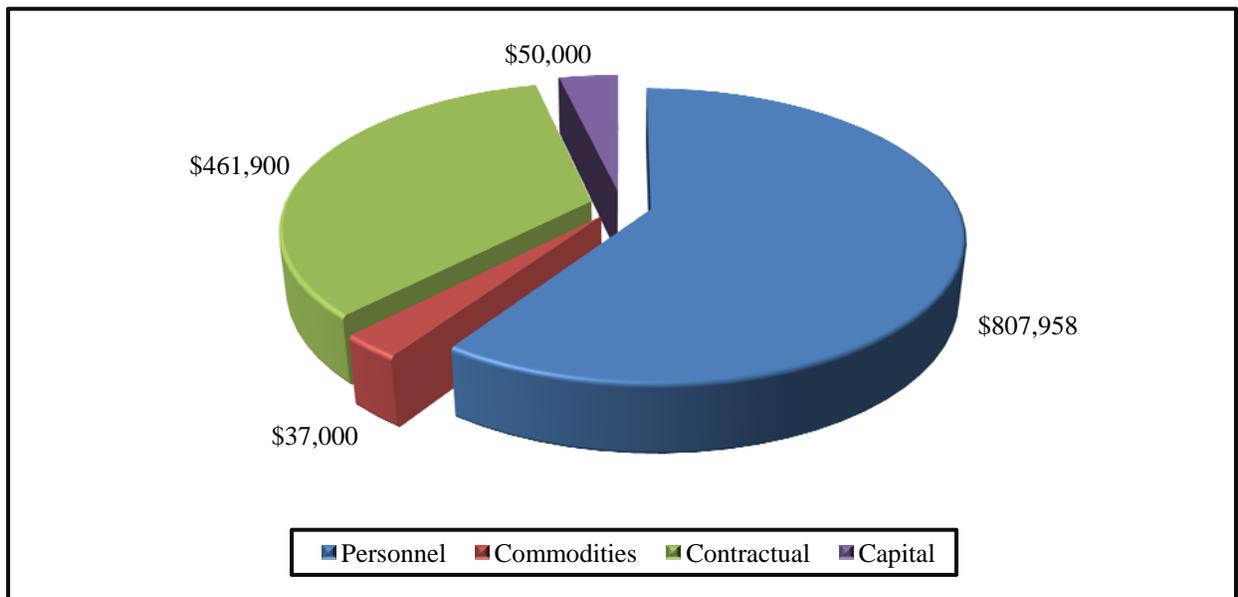
<sup>5</sup> Phase I assumes a rate of \$2.50 per square foot, Future Phase assumes a \$4.00 per square foot rate.

<sup>6</sup> Future Phase and the addition of cardio and weight equipment assume that Jefferson City would own those pieces of equipment and not rent.

**Total Expenses – Phase I:**



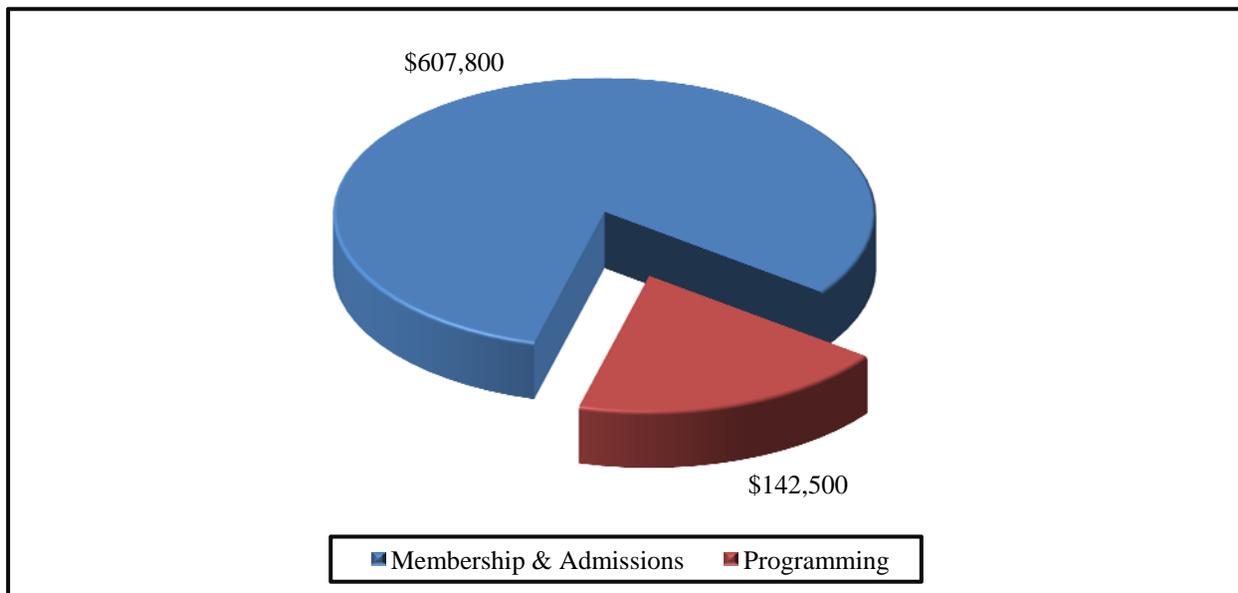
**Total Expenses – Future Phase:**



**Revenue Generation:**

Total Revenue Generation	Phase I	Future Phase
Gym Use Programs	\$25,000	\$30,000
Little Gyms Program	\$3,000	\$3,000
Gymnasium Rentals	\$8,400	\$8,400
Meeting Room Rentals	\$0	\$6,000
Full Facility Rentals	\$9,000	\$33,000
Group Exercise	\$0	\$30,000
Swim Lessons	\$0	\$9,600
Vending	\$7,500	\$22,500
Annual Passes	\$0	\$600,000
Daily Admissions	\$10,400	\$7,800
<b>Totals</b>	<b>\$63,300</b>	<b>\$750,300</b>

**Total Revenue – Future Phase:**



### Financial Recovery – Phase I

This first illustration and 5-year projection takes into account all associated expense illustrated in the report. Based upon that information:

	<b>Total</b>
Expenses <sup>7</sup>	\$198,926
Revenues	\$63,300
Difference	<b>(\$135,626)</b>
Cost Recovery Rate	32%

The following chart provides a 5-year projection for a Jefferson City indoor multi-use recreation facility based upon the numbers contained in this report. The expense line item anticipates a 2% increase in years 2-3 and a 3% increase in years 4-5. The revenue line item anticipates a 3% increase in revenues.

	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>
Expenses	\$198,926	\$202,904	\$206,962	\$213,171	\$219,566
Revenues	\$63,300	\$65,199	\$67,155	\$69,170	\$71,245
Difference	<b>(\$135,626)</b>	<b>(\$137,705)</b>	<b>(\$139,807)</b>	<b>(\$144,002)</b>	<b>(\$148,322)</b>
% Recovery	32%	32%	32%	32%	32%
Cap. Replace	\$15,000	\$30,000	\$45,000	\$60,000	\$75,000

This operations pro-forma was completed based on the best information available and a basic understanding of the project. However, there is no guarantee that the expense and revenue projections outlined above will be met as there are many variables that affect such estimates that either cannot be accurately measured or are not consistent in their influence on the budgetary process.

<sup>7</sup> Does not factor in the capital replacement dollars.

### Financial Recovery – Future Phase

This first illustration and 5-year projection takes into account all associated expense illustrated in the report. Based upon that information:

	<b>Total</b>
Expenses <sup>8</sup>	\$1,306,858
Revenues	\$750,300
Difference	<b>(\$556,558)</b>
Cost Recovery Rate	57%

The following chart provides a 5-year projection for a Jefferson City indoor multi-use recreation facility based upon the numbers contained in this report. The expense line item anticipates a 3% increase in expenses. The revenue line item anticipates a 3% increase in revenues.

	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>
Expenses	\$1,306,858	\$1,346,064	\$1,386,445	\$1,428,039	\$1,470,880
Revenues	\$750,300	\$787,815	\$811,449	\$835,793	\$860,867
Difference	<b>(\$556,558)</b>	<b>(\$558,249)</b>	<b>(\$574,996)</b>	<b>(\$592,246)</b>	<b>(\$610,013)</b>
% Recovery	57%	59%	59%	59%	59%
Cap. Replace	\$50,000	\$100,000	\$150,000	\$200,000	\$250,000

This operations pro-forma was completed based on the best information available and a basic understanding of the project. However, there is no guarantee that the expense and revenue projections outlined above will be met as there are many variables that affect such estimates that either cannot be accurately measured or are not consistent in their influence on the budgetary process.

<sup>8</sup> Does not factor in the capital replacement dollars.

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## Operational Deficit

In both facility scenarios, Phase I and Future Phase, Ballard\*King & Associates has illustrated an operational deficit for the facility. This is not an uncommon occurrence for municipally operated recreation facilities across the State of Missouri and the Country. This does lead to a question of how other municipally operated indoor recreation facilities continue to function at an operating deficit. The answer to that question is one that is as unique and varied as the number of organizations working to overcome the problem.

### *Market*

An obstacle that Jefferson City currently faces is that they are not the sole provider of recreation services within the market place. As such price points for programs, services and rental of indoor spaces have been set. Jefferson City has operated in a direct-cost recovery service mindset with programs to date. The addition of a new indoor space and associated operating cost may require that the Department continue that direct-cost recovery philosophy and also add in a necessary facility fee for program activities using the building. The Department will need to re-evaluate their fee structure for programs, services and facilities to be sure that opportunities have not been missed.

### *½ Cent Sales Tax*

The most common method by which other municipal governments within the State of Missouri overcome the obstacle of getting a facility built and then off-setting the operational deficit is through the ½ cent sales tax. This is a resource that the Jefferson City Parks, Recreation & Forestry Department has already tapped and in doing so has transferred all of their current day-to-day operational costs away from property tax. Other organizations use the ½ cent sales tax without significantly decreasing their other funding mechanisms. A common problem amongst organizations that do leverage a ½ cent sales tax to fund construction of a new facility is that they do not account for an operational subsidy.

### *Programming*

The Phase I program recommendations will put the Department in a position where for the first time outside of ice programming they will control the venue in which programs are held and the “destiny” of said programs. It will be important that the staff focus on this opportunity in that they ensure that core services areas have been identified by the department and that those services/programs receive preferential scheduling in the facility. Once the City’s programmatic needs have been met they will need to fill in open facility time with other types of programming and facility rentals.

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*Facility Rentals*

Through conversations with the Department Staff and other user groups in the City it is recognized that the availability of quality gymnasium space is limited. Within lies another significant revenue generating opportunity, facility rentals. While this is not something that will cash flow the operation it will be important for the Department to develop a rental structure and reservation system long before the building opens to the public. This will allow for the marketing of a rental option to other community groups that may be interested in those types of services and facilities. In developing the rental structure it will be important that the staff not only factors in the cost of the facility but also necessary set-up/tear-down time and equipment rental.

**Hours of Operation:**

The following chart prescribes probable hours of operation for the proposed phases and is what the part-time staffing detail is built from.

*Phase I – Hours of Operation*

	<b>Open</b>	<b>Close</b>	
Monday	10:00A	9:00P	11
Tuesday	10:00A	9:00P	11
Wednesday	10:00A	9:00P	11
Thursday	10:00A	9:00P	11
Friday	10:00A	8:00P	10
Saturday	8:00A	8:00P	12
Sunday	12:00P	8:00P	8
		Hours per Week	74
		Weeks	52
		<b>Total Hours</b>	<b>3,848</b>

*Future Phase – Hours of Operation*

	<b>Open</b>	<b>Close</b>	
Monday	5:30A	9:00P	15.5
Tuesday	5:30A	9:00P	15.5
Wednesday	5:30A	9:00P	15.5
Thursday	5:30A	9:00P	15.5
Friday	5:30A	8:00P	14.5
Saturday	8:00A	8:00P	12
Sunday	12:00P	9:00P	9
		Hours per Week	97.5
		Weeks	52
		<b>Total Hours</b>	<b>5,070</b>

**Full-Time Staffing Detail:**

The following chart prescribes a functional organization chart.

	Phase I <sup>9</sup>	Future Phase
Facility Manager	-	\$55,000
Maintenance Foreman	-	\$45,000
Custodian	-	\$135,000 <sup>10</sup>
Aquatics Leader	-	\$35,000
Fitness Leader	-	\$35,000
Facility Supervisor	-	
Total Salary	-	\$305,000
Benefits (40%)	-	\$122,000
Total Full-Time Salary & Benefits	-	<b>\$427,000</b>

**Part-Time Staffing Detail:**

Having outlined the hours of operation for the facility and the full-time staff it is possible to look at the part-time staff required to operate the facility in a safe and functional manner. It should be noted that part-time pay rates are recommended rates by Ballard\*King & Associates, those could fluctuate based upon Jefferson City's current pay structure or year the facility opens.

	Phase I	Future Phase
Front Desk	\$48,701 <sup>11</sup>	\$90,684
Head Lifeguard	-	\$49,218
Lifeguard	-	\$166,315
Building Supervisor	-	\$53,711
Instructors	-	\$21,030
	<b>\$48,701</b>	<b>\$380,958</b>

<sup>9</sup> It is possible to open a facility like this without an increase in full-time staffing levels, but it will require the staff to give careful consideration to current and future workload of the individual(s) that will be responsible for said operation.

<sup>10</sup> This number assumes 4.5 custodians @ \$30,000 annually, which equates to 180 hours of coverage.

<sup>11</sup> This number represents staffing the front desk/entrance point of the facility at non-business hours, i.e. evenings and weekends. Beyond those times the full-time staff working at the facility will be responsible for the daily foot traffic.



*Front Desk – Phase I*

	Open	Close	Hours	Staffing	Rate	
Monday	4:45P	9:15P	4.5	2	\$10.00	\$90.00
Tuesday	4:45P	9:15P	4.5	2	\$10.00	\$90.00
Wednesday	4:45P	9:15P	4.5	2	\$10.00	\$90.00
Thursday	4:45P	9:15P	4.5	2	\$10.00	\$90.00
Friday	4:45P	8:15P	3.5	2	\$10.00	\$70.00
Saturday	7:45A	8:15P	12.5	2	\$10.00	\$250.00
Sunday	11:45A	9:15P	9.5	2	\$10.00	\$190.00
					Per Week	\$870.00
					Weeks	52
					Sub Total	\$45,240.00
					FICA	\$3,460.86
					<b>Total</b>	<b>\$48,701</b>

*Front Desk – Future Phase*

	Open	Close	Hours	Staffing	Rate	
Monday	5:15A	1:15P	8	1	\$10.00	\$80.00
	1:15P	9:15P	8	2	\$10.00	\$160.00
Tuesday	5:15A	1:15P	8	1	\$10.00	\$80.00
	1:15P	9:15P	8	2	\$10.00	\$160.00
Wednesday	5:15A	1:15P	8	1	\$10.00	\$80.00
	1:15P	9:15P	8	2	\$10.00	\$160.00
Thursday	5:15A	1:15P	8	1	\$10.00	\$80.00
	1:15P	9:15P	8	2	\$10.00	\$160.00
Friday	5:15A	1:15P	8	1	\$10.00	\$80.00
	1:15P	8:15P	7	2	\$10.00	\$140.00
Saturday	7:45A	8:15P	12.5	2	\$10.00	\$250.00
Sunday	11:45A	9:15P	9.5	2	\$10.00	\$190.00
					Per Week	\$1,620.00
					Weeks	52
					Sub Total	\$82,620.00
					FICA	\$6,320.43
					<b>Total</b>	<b>\$90,684</b>



*Building Supervisor – Future Phase*

	Open	Close	Hours	Staffing	Rate	
Monday	5:15A	9:15P	16	1	\$9.50	\$152.00
Tuesday	5:15A	9:15P	16	1	\$9.50	\$152.00
Wednesday	5:15A	9:15P	16	1	\$9.50	\$152.00
Thursday	5:15A	9:15P	16	1	\$9.50	\$152.00
Friday	5:15A	8:15P	15	1	\$9.50	\$142.50
Saturday	7:45A	8:15P	12.5	1	\$9.50	\$118.75
Sunday	11:45A	9:15P	9.5	1	\$9.50	\$90.25
					Per Week	\$959.50
					Weeks	52
					Sub Total	\$48,934.50
					FICA	\$3,743.49
					<b>Total</b>	<b>\$53,711</b>

*Head Lifeguard School Year – Future Phase*

	Open	Close	Hours	Staffing	Rate	
Monday	5:15A	1:15P	8	1	\$10.00	\$80.00
	2:45P	8:45P	6	1	\$10.00	\$60.00
Tuesday	5:15A	1:15P	8	1	\$10.00	\$80.00
	2:45P	8:45P	6	1	\$10.00	\$60.00
Wednesday	5:15A	1:15P	8	1	\$10.00	\$80.00
	2:45P	8:45P	6	1	\$10.00	\$60.00
Thursday	5:15A	1:15P	8	1	\$10.00	\$80.00
	2:45P	8:45P	6	1	\$10.00	\$60.00
Friday	5:15A	1:15P	8	1	\$10.00	\$80.00
	2:45P	7:45P	5	1	\$10.00	\$50.00
Saturday	7:45A	7:45P	12	1	\$10.00	\$120.00
Sunday	11:45A	8:45P	6	1	\$10.00	\$60.00
					Per Week	\$870.00
					Weeks	36
					Sub Total	\$31,320.00
					FICA	\$2,395.98
					<b>Total</b>	<b>\$33,716</b>

*Head Lifeguard Summer – Future Phase*

	Open	Close	Hours	Staffing	Rate	
Monday	5:15A	8:45P	14	1	\$10.00	\$140.00
Tuesday	5:15A	8:45P	14	1	\$10.00	\$140.00
Wednesday	5:15A	8:45P	14	1	\$10.00	\$140.00
Thursday	5:15A	8:45P	14	1	\$10.00	\$140.00
Friday	5:15A	7:45P	13	1	\$10.00	\$130.00
Saturday	7:45A	7:45P	12	1	\$10.00	\$120.00
Sunday	11:45A	8:45P	9	1	\$10.00	\$90.00
					Per Week	\$900.00
					Weeks	16
					Sub Total	\$14,400.00
					FICA	\$1,101.60
					<b>Total</b>	<b>\$15,502</b>

*Lifeguard School Year – Future Phase*

	Open	Close	Hours	Staffing	Rate	
Monday	5:15A	1:15P	8	1	\$8.00	\$64.00
	2:45P	8:45P	6	6	\$8.00	\$288.00
Tuesday	5:15A	1:15P	8	1	\$8.00	\$64.00
	2:45P	8:45P	6	6	\$8.00	\$288.00
Wednesday	5:15A	1:15P	8	1	\$8.00	\$64.00
	2:45P	8:45P	6	6	\$8.00	\$288.00
Thursday	5:15A	1:15P	8	1	\$8.00	\$64.00
	2:45P	8:45P	6	6	\$8.00	\$288.00
Friday	5:15A	1:15P	8	1	\$8.00	\$64.00
	2:45P	7:45P	5	6	\$8.00	\$240.00
Saturday	7:45A	12:00P	12	2	\$8.00	\$192.00
	11:45A	7:45P	8	6	\$8.00	\$384.00
Sunday	11:45A	8:45P	9	6	\$8.00	\$432.00
					Per Week	\$2,720.00
					Weeks	36
					Sub Total	\$97,920.00
					FICA	\$7,490.88
					<b>Total</b>	<b>\$105,411</b>

*Lifeguard Summer – Future Phase*

	Open	Close	Hours	Staffing	Rate	
Monday	5:15A	12:00P	6.75	2	\$8.00	\$108.00
	11:45A	8:45P	9	6	\$8.00	\$432.00
Tuesday	5:15A	8:45P	6.75	2	\$8.00	\$108.00
	11:45A	8:45P	9	6	\$8.00	\$432.00
Wednesday	5:15A	8:45P	6.75	2	\$8.00	\$108.00
	11:45A	8:45P	9	6	\$8.00	\$432.00
Thursday	5:15A	8:45P	6.75	2	\$8.00	\$108.00
	11:45A	8:45P	9	6	\$8.00	\$432.00
Friday	5:15A	7:45P	6.75	2	\$8.00	\$108.00
	11:45A	7:45P	8	6	\$8.00	\$384.00
Saturday	7:45A	12:00P	4.25	2	\$8.00	\$68.00
	11:45A	7:45P	8	6	\$8.00	\$384.00
Sunday	11:45A	8:45P	9	6	\$8.00	\$432.00
					Per Week	\$3,536.00
					Weeks	16
					Sub Total	\$56,576.00
					FICA	\$4,328.06
					<b>Total</b>	<b>\$60,904</b>

*Swim Lesson Instructors– Future Phase*

Sessions	Classes/Ses.	Class/Class	Hr/Class	Total Hours	Rate/Hr	Total
10	6	8	1	480	\$11	\$5,280

*Group Exercise Instructors– Future Phase*

Months	Weeks	Classes/Wk	Hr/Class	Total Hours	Rate/Hr	Total
10	42	10	1.5	630	\$25	\$15,750

**Revenue Detail:**

	<b>Phase I</b>	<b>Future Phase</b>
Various Programs	\$25,000	\$30,000

The dollars in this chart account for current gymnasium use programs that are paying facility rent in the community. This also assumes that these programs fees would not increase. It should be noted that this does not take into account the absorbing all rental dollars into the operation as it is expected that some programs would need to continue to rent facilities. This becomes a discussion of efficiency for the overall operation. It should also be noted that with improved facilities there would be an opportunity to increase the fee for the program.

	<b>Months</b>	<b>Punch Card</b>	<b>Cards Sold</b>	<b>Phase I</b>	<b>Future Phase</b>
Little Gymers Programs	9	\$30	100	\$3,000	\$3,000

A “Little Gymers” type of program would be one that could utilize the gymnasium at low use times during the day. This program would operate on a punch card basis which assumes that cards would be purchased for “X” number of visits. During a program such as this a gymnasium could be animated with music, various inflatable equipment, mats, etc.

	<b>Rate/Hr</b>	<b>Hours/Mo</b>	<b>Months</b>	<b>Phase I</b>	<b>Future Phase</b>
Gymnasium Rentals	\$35	20	12	\$8,400	\$8,400

	<b>Rate/Hr</b>	<b>Hours/Mo</b>	<b>Months</b>	<b>Phase I</b>	<b>Future Phase</b>
Meeting Room Rentals	\$25	12	12	\$0	\$6,000

This is a conservative estimate of the number of hours of gymnasium space and meeting room space that would be rented on a monthly basis. It is important to note that in many focus groups and stakeholder meetings there were questions as to whether groups would have to pay to use facilities.

It is important to note that when Jefferson City develops a rental fee structure there should also be an accounting of staffing, set-up time, tear-down time and equipment rental.

	Day Rate	Number	Phase I	Future Phase
Full Facility – Phase I	\$3,000	3	\$9,000	-
Full Facility – Future Phase	\$5,500	6	-	\$33,000

As with the meeting rooms and gymnasium rentals the number of full facility rentals is a conservative approach. Depending upon the need within the community and the marketing of new events to Jefferson City, these numbers could be significantly more. When looking at rentals such as this, consideration should be given to the overall impact on the other users or members of the facility and the impact upon staff. It is even more important with full facility rentals to ensure that you are recovering all associated staffing costs with the rental; supervision, custodial, lifeguards, etc.

	Rate/Month	Months	Participants	Future Phase
Group Exercise Program	\$30	10	100	\$30,000

The popularity of group exercise classes continues to increase and as such they are definite revenue stream for any operation. It would be B\*K's recommendation to take a buffet-style approach to offering these classes. In other words individuals would pay a flat fee per month and be able to choose from a variety of classes; spinning, yoga, Pilates, aqua aerobics, etc. Income would be based upon quality of program and quality of facility, however expenses would also fluctuate with the number of programs offered as well.

	Rate	Session	Classes/Sess.	Ave. Attend	Future Phase
Swim Lessons	\$40	10	6	4	\$9,600

The swim lesson program outlined in this chart is a very easy to implement group swim lesson program that would run between September and May. The department would have to make the decision about offering swim lessons outdoors during the summer or continuing to just offer swim lessons indoors, thereby streamlining the operation and decreasing overall operating expenses at the outdoor pools. Another program that would go hand in hand with a group swim lesson program would be a private swim program. Those numbers are not reflected in this pro-forma. As with group exercise group swim lessons should be a revenue generating program.

	Phase I Product	Future Phase Product	Mark-up	Phase I	Future Phase
Vending	\$5,000	\$15,000	150%	\$7,500	\$22,500

It would be the recommendation of B\*K to not get into the business of operating a concession stand within Phase I or Future Phase of the facility. That being said those services can be supplemented through vending and front desk operation. Vending can either be done through a contracted provided or handled in-house, with advantages to both types of operation.

	Rate	Number/Wk	Weeks	Phase I	Future Phase
Daily Admissions	\$2.00	100	52	\$10,400	-
Daily Admissions	\$5	30	52	-	\$7,800

Depending upon the membership structure to the facility the number of daily admissions in a facility can increase or decrease. It is the opinion of B\*K that the numbers reflected in the chart above would be attainable numbers in Phase I and Future Phase of the facility. While there is a daily admission fee for the Phase I option it will need to be evaluated on a consistent basis as to how it is being received by the public.

A transition from Phase I to Future Phase will require the need for an explanation to the public at large and a transition from a nominal per individual fee to a more substantial fee.

	Average Rate	Number Sold	Phase I	Future Phase
Annual Passes	\$400	1,500	-	\$600,000

Pass sales will be a driving factor with regards to cost recovery if Jefferson City were to transition from Phase I to Future Phase of the facility. The rate reflected in the chart above is a conservative estimate but it is also an average or individual, student, senior, family, etc. A varied fee structure such as this is commonplace within the state of Missouri. That being said there are organizations like Lee's Summit that are moving to a flat fee per individual for pass holder rates. Fee structure and rates will be another discussion point once Jefferson City moves to the Future Phase.

The total number of passes sold reflects 6.7% of the households in Jefferson City or approximately 1% of the Primary Service Area.