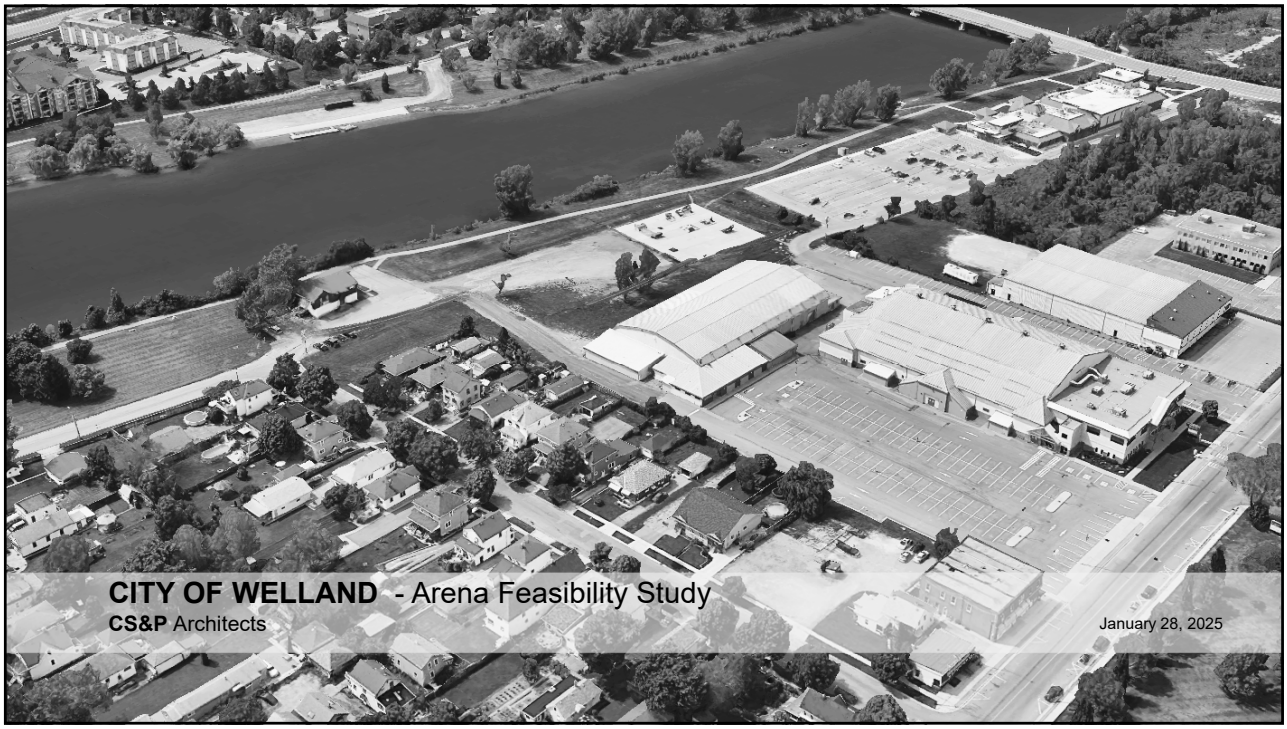


GENERAL COMMITTEE MEETING AGENDA

1. Introductions
2. Purpose of Meeting
3. Feasibility Study
4. Key Decision #1 - Number of Ice Pads
5. Key Decision #2 - Retrofit Versus New
6. Key Decision #3 - Site Location
7. Discussion and Feedback



CS&P Architects

INTRODUCTIONS



- **Managing Principal**
- **Experience in Ice Arena and Recreational Public Sector Work**
- **Feasibility Study Expertise**
- **Urban Design Expertise, MUD**

Susan Lewin, Managing Principal

B ARCH, MUD, OAA, FRAIC, LEED BD+C, ND, CPHD

- Lawrence Heights Community Centre Net Zero Emissions
- Davisville Aquatic Centre Net Zero Emissions
- Burnhamthorpe Community Centre and Ice Arena
- Regent Park Community Centre
- Birchmount Community Centre
- Victoria Road Recreation Centre and Ice Arena
- Balmoral Recreation Centre, Brampton
- Mount Dennis Net Zero Energy Childcare
- Three City Recreational Facilities Feasibility Study
- Aurora Family Leisure Complex and Ice Arena
- North Toronto Collegiate Redevelopment
- Richmond Green Sports Complex
- University of Waterloo SLC, Physical Activities Complex



INTRODUCTIONS



- **Project Architect**
- **Experience in Recreational Public Sector Work**
- **Feasibility Study Expertise**

Ryan Giuricich, Project Architect
B ARCH, OAA,

- Lawrence Heights Community Centre Net Zero Emissions
- Davisville Aquatic Centre Net Zero Emissions
- Balmoral Recreation Centre
- Burnhamthorpe Community Centre and Ice Arena
- Victoria Road Recreation Centre and Ice Arena
- Stronach Aurora Recreation Complex Addition and Renovation
- Mount Dennis Net Zero Energy Childcare
- University of Waterloo SLC, Physical Activities Complex
- Three City Recreational Facilities Feasibility Study
- Aquatic Centre Feasibility Study, Timmons
- Gellert Community Centre Feasibility Study, Halton Hills
- City Hall Revitalization, Mississauga
- New Groh Public School
- Youth Centre Feasibility Study, Acton



CS&P ARCHITECTS

Recreation

- Lawrence Heights Community Centre NZB
- Davisville Aquatic Centre NZB
- Balmoral Recreation Centre
- Burnhamthorpe Community Centre and Ice Arena
- Wayne Gretzky Sports Complex Ice Arena
- Gravenhurst Centennial Centre and Ice Arena
- Victoria Road Recreation Centre and ice Arena
- Regent Park Community Centre
- Lancers Sports and Recreation Centre
- Aurora Family Leisure Complex and Ice Arena
- Bracebridge Recreation Centre
- Harbourfront Community Centre
- Niagara Civic and Convention Centre
- U of Waterloo Physical Activity Complex
- U of Windsor Lancers Recreation
- Aurora Stronach Recreation Complex and Ice Arena
- West End YMCA/Brampton YMCA



CS&P ARCHITECTS

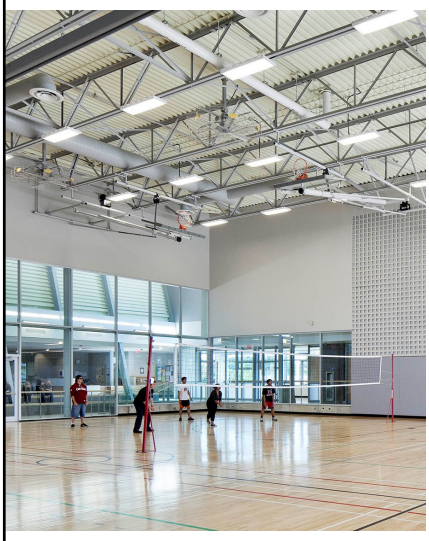
Ice Arenas

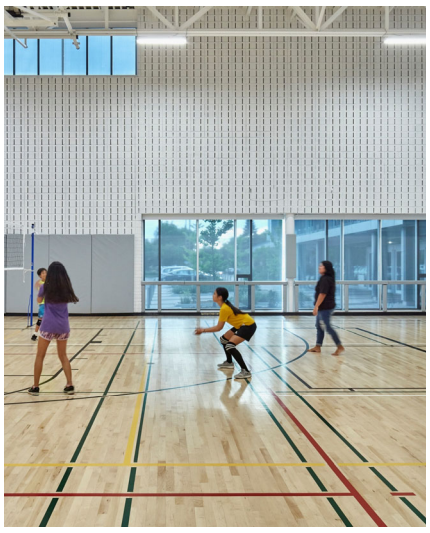


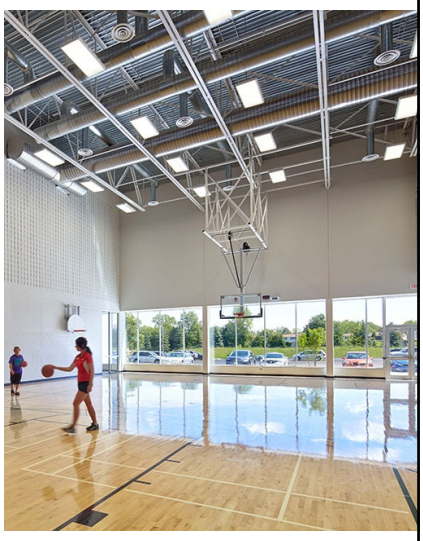
- Wayne Gretzky Sports Complex Ice Arena
- Gravenhurst Centennial Centre and Ice Arena
- Victoria Road Recreation Centre and Ice Arena
- Burnhamthorpe Community Centre and Ice Arena
- Aurora Family Leisure Complex and Ice Arena
- Toronto Cricket Club Skating and Curling Club Master Plan
- Benjamin Vaughan Complex Ice Arena
- Paul Coffey Ice Arena Feasibility Study
- Richmond Green Sports Complex Feasibility Study
- Three City Recreational Facilities Feasibility Study
- Mississauga Celebration Square Outdoor Rink
- South Fish Creek Multi-Use Facility Four Pad Arena

CS&P ARCHITECTS

Gymnasiums

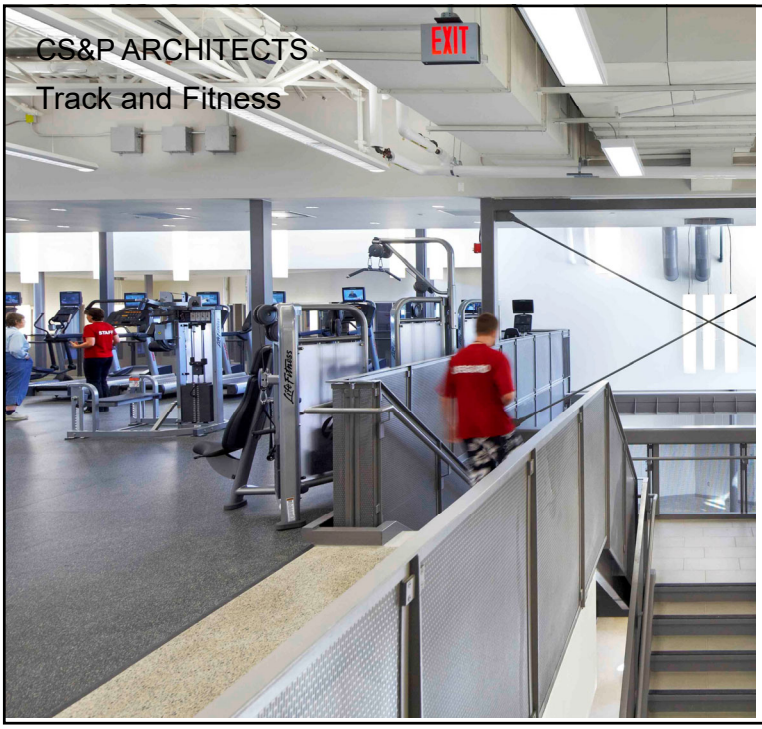


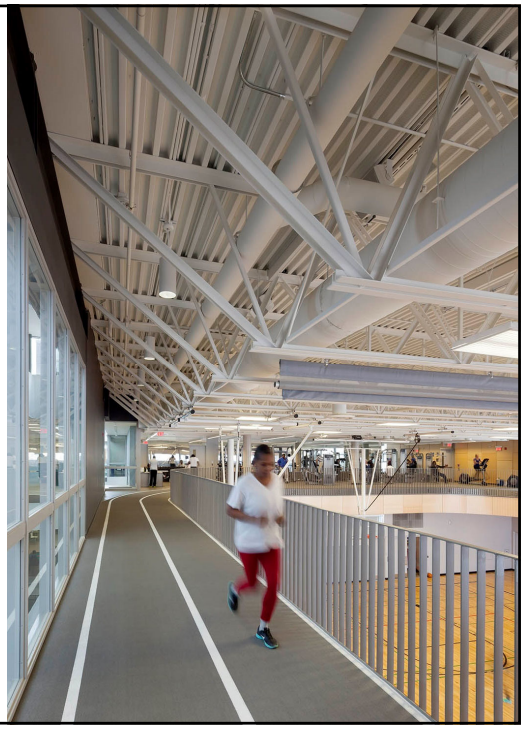




CS&P ARCHITECTS

Track and Fitness



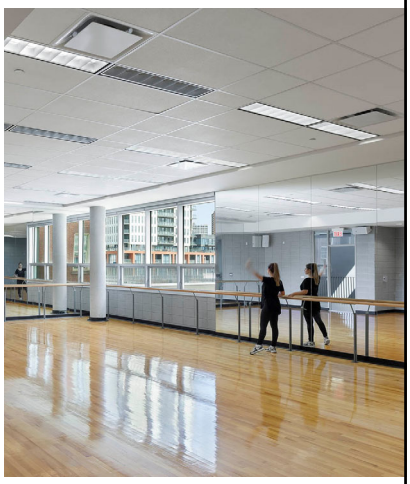


CS&P ARCHITECTS

Multi-Purpose







URBAN METRICS



- **Market Analysis**
- **Economic Impact**
- **Minor Hockey Coach**

Shawn Donahue, Professional Land Economist

- Growth Analysis and Urban Land Needs Study, City of Kingston
- Market Impact Study - Site Redesignation, Alliston
- Market Demand and Commercial Lands Feasibility Analysis - Municipality of North Perth & Nichol Properties
- Employment Land Conversion, Economic Benefits Assessment - SmartCentres, Whitchurch-Stouffville, ON
- Market Demand and Impact Study, The Markdale - JD Development Group, Markham, ON
- City of Brantford - Powerline Road, Commercial Needs & Feasibility Assessment - NEBCI Landowners Group, Brantford, ON
- Retail Market Demand and Impact Study - Navigator, Peterborough ON
- Mixed Use Development, Commercial Opportunity Assessment and Tenant Demand Analysis, Edmonton, AB

PURPOSE OF MEETING

The purpose of todays meeting is to gather feedback on where the data is leaning today on three key decision points for Council:

- Key Decision #1 - Number of Ice Pads
- Key Decision #2 - Retrofit Versus New
- Key Decision #3 - Site Location

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CITY OF Welland

FEASIBILITY STUDY



Feasibility Study Scope

Future planning is required based on the current condition and age of the Arenas. Significant investment will be required into these facilities over the next 10 years based on the Building Condition Assessments. With future population growth and service demands for ice related activities, planning now is required.

The feasibility study will establish improvement opportunities for the existing arenas, as well as other possible sites in Welland for a new build, to be supported by cost estimates. At the end of the study, City staff will bring forward a recommendation and estimated budget to Council. The approved budget will determine what moves forward for more detailed design, or when the work could happen. Timelines have not yet been definitively established.

Study Timeline

August 2024	Feasibility Study Start
September 25, 2024	Public Meeting 1
November 6, 2024	Public Meeting 2
November 2024	Concept Finalization
January/February 2025	Presentation to Council
February 2025	Completion of Study

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City of Welland

FEASIBILITY STUDY

Public Consultation Schedule

September 9 - 23 Online Survey - provided additional public input- 92 responses
September 25 - Public Meeting 1 – Information gathering, Arena Advisory Committee Feedback
November 6 - Public Meeting 2- Solicit Feedback

Feedback to Date

- Cannot focus only on hockey, need to bring in more people and support, need a new multi- use facility
- Need a training facility- weights and conditioning, track- can be used for dry land training
- Basketball leagues want to come here, need a gym, accommodate pickleball and other games
- Accommodate accessibility provisions such as sledge hockey, basketball, para-Olympian sports
- Need community space, meeting /gathering space, food and drink, warm side viewing
- We are at capacity right now and need more ice time for others users such as girls' hockey. Simply building a twin pad will not solve our capacity issues

Top Three Multi-Use Priorities

1. Gymnasium
2. Running/walking track
3. Fitness - Weights and Conditioning

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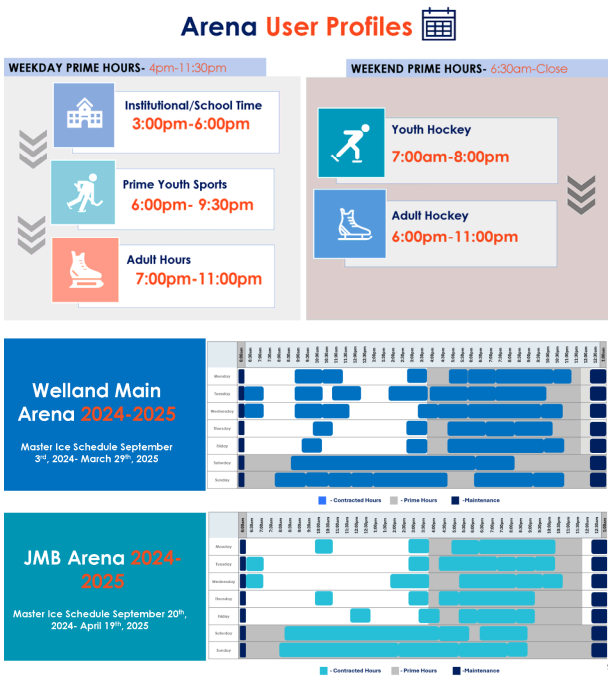
City of Welland

MARKET ANALYSIS – NUMBER OF ICE PADS

MARKET ANALYSIS

Current Welland usage of prime, non-prime and public skating

- Prime time ice is presently constrained, with the core hours are almost entirely covered. There is little opportunity to generate additional revenue.
- Demand indictors are showing that there is a shortage of ice facilities in Welland.
- As a combined facility, Welland arenas are running at 87.5% permit utilization of prime time for hockey.
- Other organizations are leaving the market to use facilities in multiple other locations.



MARKET ANALYSIS

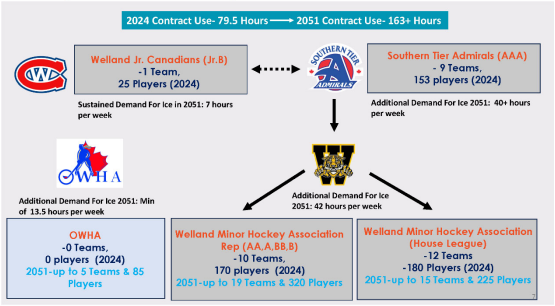
Future Opportunities

- These 5 groups currently account for on average 130 hours of uses per week, mostly hockey related.
- There are opportunities to improve service: ie associations that currently have to go elsewhere- for example, Southern Tier Admirals and Welland Minor Hockey is booking about 60 hours a week outside of Welland.
- Opportunities to enhance usage in the Welland market are local OWHA (women's), Figure Skating/Canskate, Ringette, Sledge Hockey, Men's and Women's leagues (over 30,000 members), and Private Instruction/Skills
- Since the City of Welland only has 2 pads, usually WMHA has to hire outside arenas for most tournaments.

Weekly Ice Time Allocation & Contracts of Welland Arenas



Simplified Minor Hockey Demand Forecast - 4 Pad Scenario

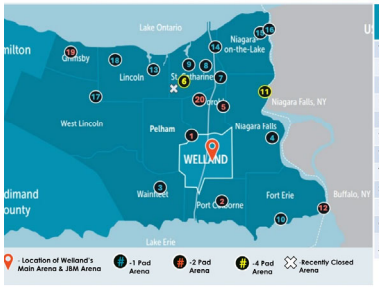


MARKET ANALYSIS

Regional usage data & regional design

- Niagara region is not recently over serviced. We are seeing a rejuvenation of older facilities, and the total number of rinks are not over capacity. Welland is presently at 27,875 persons per pad as of today, the highest of any local provider.
- Operators are reporting that 80% of their prime-time ice time is under permit.
- New facilities are becoming multi faceted facilities with other uses- gyms, fitness etc.
- Currently, the absence of available prime time ice hours restrains the growth of hockey and other ice activities within Welland.

Indoor Arenas in Niagara Region in relation to Welland's Main Arena & Jack Ballantyne Memorial Arena



Municipality	# of Pads	Population	# of Residents per Pad
Welland	2	55,750	27,875
Pelham	2	18,192	9,096
Niagara Falls	5	94,415	18,883
Fort Erie	3	32,901	10,967
Port Colborne	2	20,033	10,016
Wainfleet	1	6,372	6,372
West Lincoln	1	15,454	15,454
Thorold	3*	23,816	7,939
St. Catherines	6.5*	136,803	21,047
Lincoln	2	25,719	12,859
Grimsby	2	28,883	14,441
Niagara-on-the-Lake	2	19,088	9,544

Note: 20,000 Residents per Pad guideline
*Reduced access to public

Primary Arena Competition & Allocation to Organized Minor Hockey

1. Organized minor hockey in Niagara Region is estimated to account for approximately 15,000+ hours of prime time usage/winter season.
2. The 6 main competing arenas in Niagara Region offer an estimated 31,200 hours of prime time rental/winter season.
3. Each of these competing arenas are associated with at least one lead tenant (Brock U / GOJHL affiliate).
4. Most facilities also host other types of ice activities (i.e. CanSkate, ringette, sledge hockey, etc.).
5. Estimates range from 10%-35% of prime time bookings allocated to organized minor hockey at the 6 competing arenas. In comparison, bookings with organized minor hockey at Welland's arenas account for over 60% of prime time hours.
6. Currently, the absence of available prime time ice hours restrains the growth of hockey and other ice activities within the City.



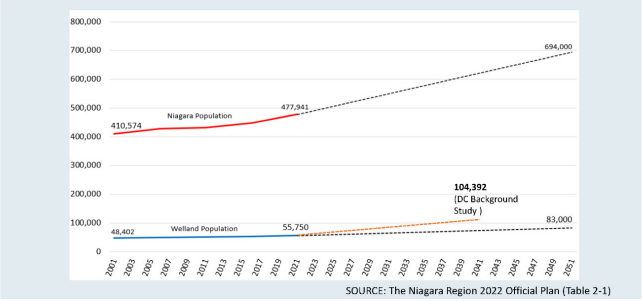
Map	Arena	# of Pads	Estimated Prime Time Bookings Involving Organized Minor Hockey **
1	Meridian Community Centre (Pelham)	2	28%
2	Vale Health and Wellness Centre (Port Colborne)	2	15%
6	Seymour-Hannah Sports Centre (St. Catharines) * Note: Ridley College also substantially used	4	35%
11	Gale Centre (Niagara Falls)	4	28%
12	Leisureplex Complex (Fort Erie)	2	25%
20	*Walker Centre (Thorold) * Note: Frank Doherty Arena also used at 20%	2	~5%-10%

MARKET ANALYSIS

Projected Population Growth

- The Residential Population Growth Forecast from 2022 to 2041 for Welland is as per the chart above, and forecasts an additional 48,642 persons by 2041. The number is almost double the population, and will drive more demand.
- Population growth will have impacts on the competitive level. Usage will increase and will provide more opportunities for a multi-tier organization

Niagara Region/Welland Population Growth and 2051 Projections



SOURCE: The Niagara Region 2022 Official Plan (Table 2-1)

Official Plan Projections

City of Welland- Residential Population Forecast - 2022-2041

City of Welland	10- Year Development Charges Study period (2022-2031)	Beyond 10 years (2032-2041)	Total to Build Out (2022-2041)	Growth
Residential Population*	25,094	23,547	48,642	87%

*Information from City of Welland Planning Department

City of Welland Projections

MARKET ANALYSIS SUMMARY - NUMBER OF ICE PADS

- Prime time ice in the two existing ice pads is presently very constrained. The core hours are almost entirely covered. There is not a lot of opportunity to generate additional revenue.
- Current demands are not being met. Requests for ice time are regularly turned down
- Other communities have newer more attractive offerings, leading to market outflow. There are opportunities to keep many users in Welland and support the local economy.
- Other local ice sport teams have been constrained from operating in Welland.
- Niagara region is not over supplied with ice arenas.
- Population is forecast to reach 100,000 by 2050. Average southern Ontario usage provision per capita is 1 rink per 20,000 residents. The significant growth of the population will lead to greater demand.

KEY DECISION #1 – NUMBER OF ICE PADS

- **Current population benchmarks indicate a three pad is required. Future demands are tracking towards the need for 4 pads for Welland within the next 10 years. Therefore the Feasibility Study recommendation is to provide a site with the capacity for a 4 pad facility design.**

SITE LOCATION

TEST FITS - 4 SITES

Goals

Site Size
- Site size to fit 4 pad arena and other multi-use recreation program uses
- Can accommodate up to 350 parking spaces

Site Synergies
- Has complementary recreational uses and amenities nearby
- Other community benefits

Location and Accessibility
- Convenience for users/visitors
- Transportation impacts

Construction Impacts
- Shut down and other impacts

Environmental Impacts
- Ability to create a low carbon sustainable facility
- Renewable energy potential



EXISTING SITE

SITE 1 - 501 KING STREET







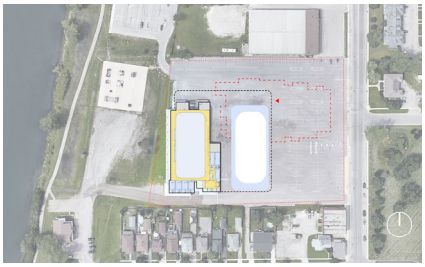
SITE 1 - 501 KING STREET



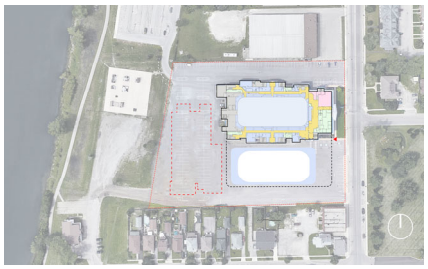
TEST FIT - EXISTING SITE 1



Option 1 - Retrofit only



Option 3 - Keep Jack Ballantyne Arena



Option 2 - Keep Main Arena



Option 4 - New Build

EXISTING SITE 1 - RETROFIT VERSUS NEW

All Options

- Due to small site, can only replace existing program, assuming parking capacity has to remain
- Existing program is not leveraging community hub synergies with other multipurpose uses, such as a full gymnasium, more MP program, fitness facilities, running track etc.
- No possibility of a future 4 pad facility

Option 1 – Full Retrofit for both buildings

- Retrofit scope has been addressed in 2022 building condition assessment as $24,801,100 over 10 years
- Energy efficiency compromised by lack of building insulation, and the operation and energy inefficiencies of two separate buildings

Option 2- Keep Main Arena, create twin pad

- Retains ‘historic’ facility, however more expensive to retrofit and maintain than JB arena
- Requires significant investment in accessibility, OBC, and building upgrades - $16,753,235 to main arena over 10 years
- Operational, energy efficiency, and security benefits to combining ice pads into one facility, one refrigeration plant

Option 3 - Keep Jack Ballantyne Arena, create twin pad

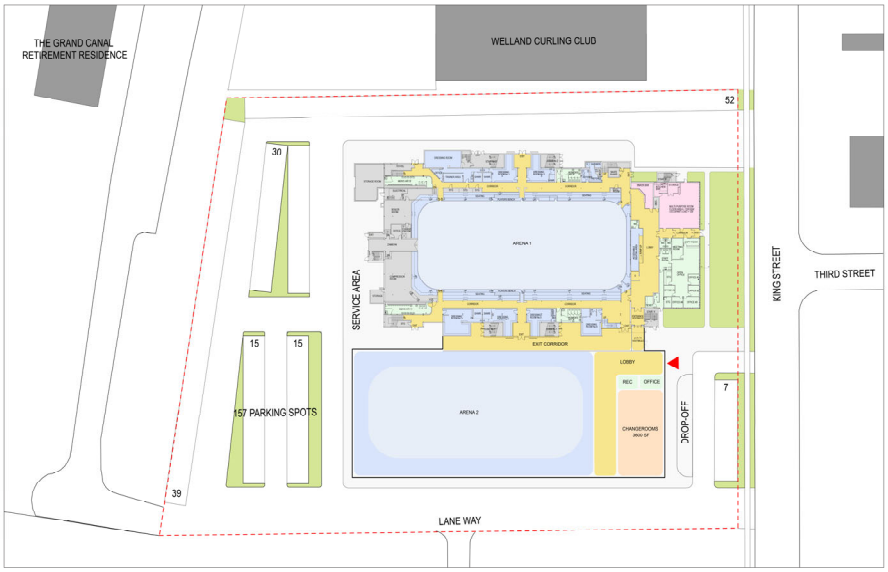
- Requires significant investment in accessibility, OBC, and building upgrades- $8,047,865 to JB arena over 10 years
- Operational, energy efficiency, and security benefits to combining ice pads into one facility, one refrigeration plant

Option 4 - New Build- Selected to proceed with developing a new option

- Benefit of a fully new modern facility, fully accessible, environmentally sustainable. As 4 pad will not fit on existing site, a new location needs to be selected.

SITE 1 - 501 KING STREET - TEST FIT OPTION 2 - RETROFIT/ADDITION

- Option 2: Demolish JBYA, Keep Main Arena Create Twin Pad
- Significant retrofit costs
- Insufficient Parking
- No possibility of a future 4 pad facility
- Does not address capacity and growth concerns



SITE 1 - 501 KING STREET - TEST FIT OPTION 4A - NEW BUILD

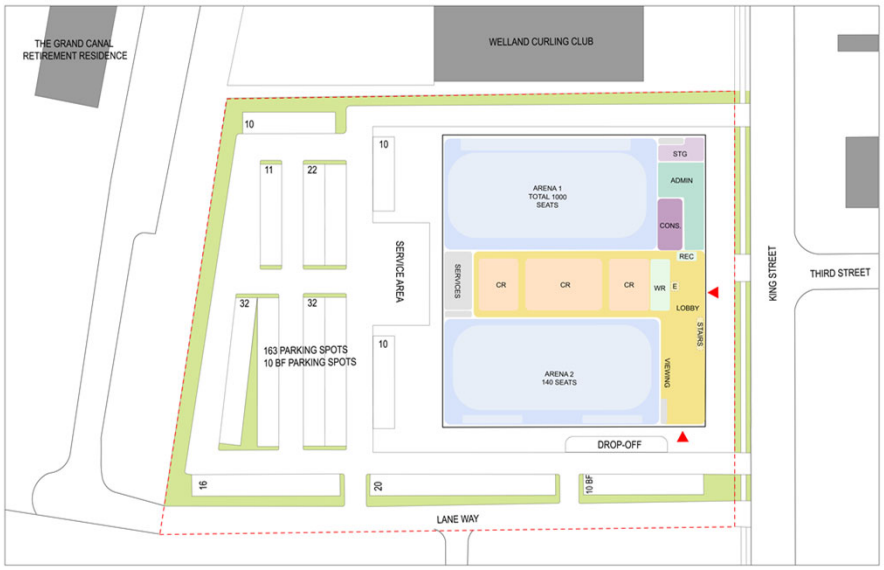
- Option 4A: Demolish Existing, New Multi-Use Twin Pad
- Insufficient Parking, service and drop off
- 4 pad will not fit on this site so not recommended to proceed.



SITE 1 SITE PLAN

SITE 1 - 501 KING STREET - TEST FIT OPTION 4B - NEW BUILD

- Option 4B: Demolish Existing, New Twin Pad Ice Arena, no multi-use
- Insufficient Parking, service and drop off
- Option to add another multi-use twin pad elsewhere first, then build this ice only facility
- Lack of site synergies, less traffic to amenities, additional operational costs



SITE 1 SITE PLAN

KEY DECISION #2 - RETROFIT VERSUS NEW

- **As a 4 pad and adequate parking will not fit on the existing site, a new location should be selected for ideal program and amenity synergies, and operational and staffing efficiencies (ie one refrigeration plant instead of two).**

ALTERNATE SITES

SITE 2 - 11 SHAW STREET



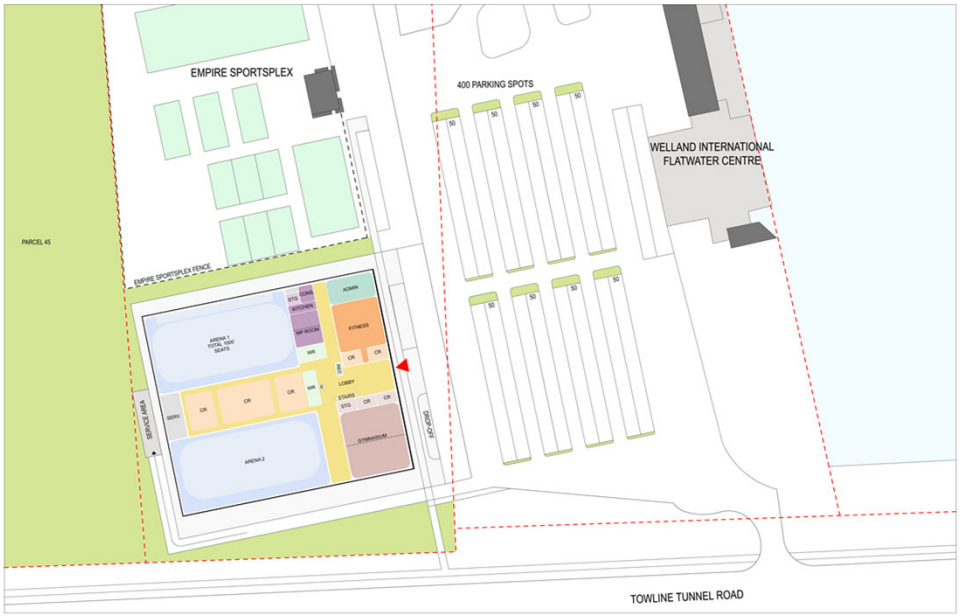




SITE 2 - 11 SHAW STREET



SITE 2 - 11 SHAW STREET – TEST FIT



SITE 3 - 405 MEMORIAL PARK DRIVE





SITE 3 - 405 MEMORIAL PARK DRIVE



SITE 3 - 405 MEMORIAL PARK DRIVE- TEST FIT



SITE 4 - 482 RIVER ROAD

- 12.6 acres, owned by the city
- Adjacent to Youngs Sportsplex, also owned by City
- Potential for expanded sports and recreation campus







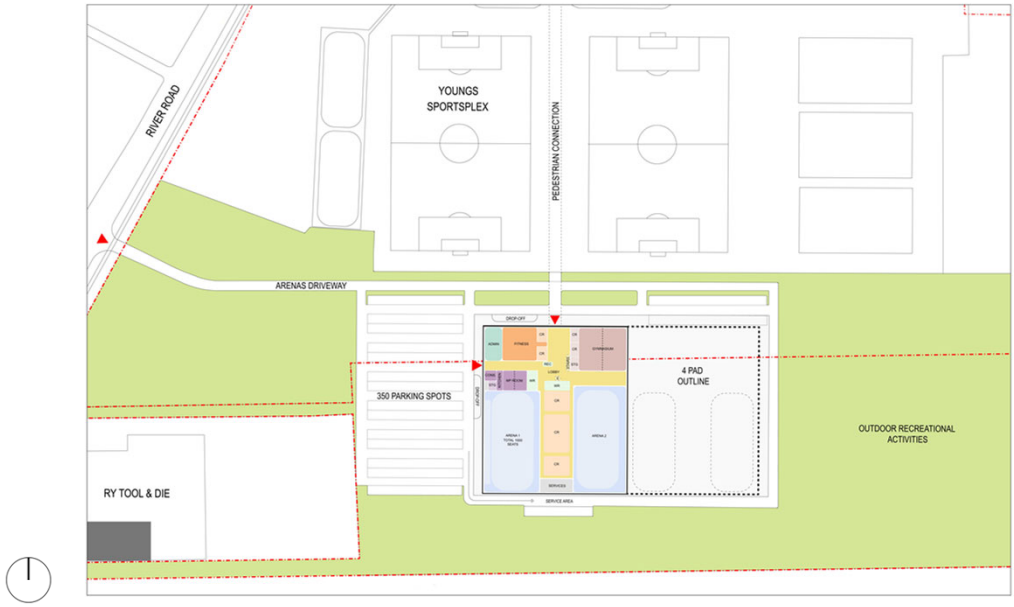
SITE 4 - 482 RIVER ROAD



SITE 4 - 482 RIVER ROAD - SITE SYNERGIES



SITE 4 - 482 RIVER ROAD - TEST FIT



SITE ANALYSIS MATRIX

- The Site Analysis Matrix shows that Property 4 at 482 River Road has the highest total score.
- It was recommended to further develop study concepts for this site

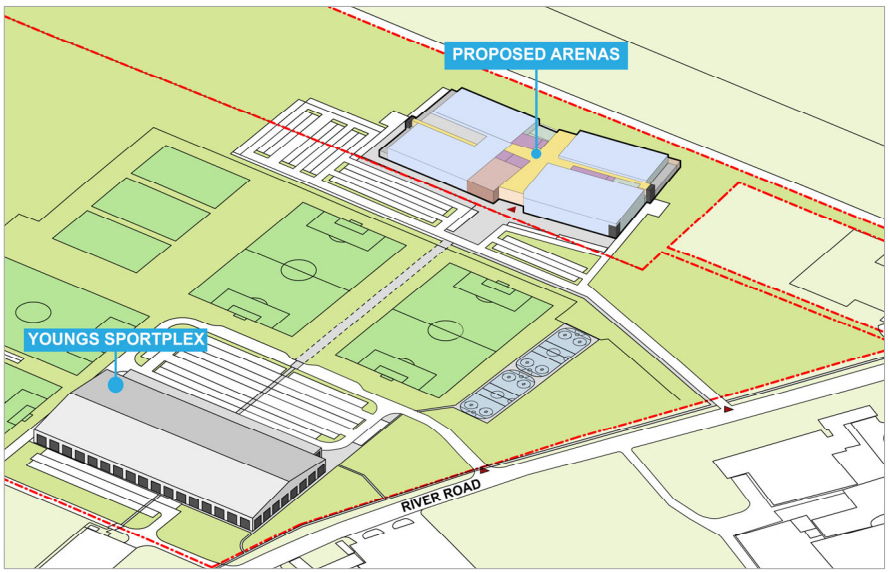
	Criteria	Property 1 501 King Street	Property 2 11 Shaw Street	Property 3 405 Memorial Drive	Property 4 482 River Road
30%	**Site Size**	4.65 acres	4.72 acres	32.4 acres	12.6 acres
	Fits a 2 pad	Yes	Yes	Yes	Yes
	Fits a 4 pad, and multi-use program	No	No	Yes	Yes
	Can accommodate up to 350 parking spaces	No	No	Yes	Yes
	Can accommodate outdoor recreation uses	No	No	Yes	Yes
	Score	**10%**	**10%**	**30%**	**30%**
20%	**Site Synergies**				
	Has complementary recreational uses neaby	Welland Community Centre, multi-purpose, therapy pool, billiards, fitness, theatre, seniors	Empire Sportsplex, outdoor sports fields. Seasonal May- October	Park, Ball Diamonds, Outdoor Pool	Youngs Sportsplex, with indoor soccer and tennis, outdoor soccer and lacrosse. Sport Campus Synergies
	Has other community amenties nearby, and community benefits	Restaurant next door, Hospital across street. Revitalization can contribute to Community Improvement Plan and Revitalizing Downtown Plans	No other amenities, close to industrial sites	No other amenities, residential single family home neighbourhood	Has hotels, shopping malls nearby, visitor convenience
	Score	**15%**	**15%**	**15%**	**20%**
20%	**Location and Accessibility**				
	Convenience for Visitors	On the border of downtown, not convenient for out of town users. Inadequate parking exists	At south edge of town, not convenient for out of town users. In industrial area	At east side of town, not convenient for out of town users. Single family detached home neighbourhood	Highway 406 is 1.5 Km away. Woodlawn Road is 4 lanes and .5 Km away, very convenient for out of town users
	Transportation Impacts	On bus route. Possible for some local users to walk or bicycle, continous sidewalks both sides of street.	No Bus route. Off Townline Tunnel Road, which has a paved shoulder, no sidewalks	On bus route. Discontinous sidewalks on narrow street. New development may overload existing road which is congested already.	On bus route. Some existing sidewalks at Youngs Sportplex. Recommend extending existing sidewalk south.
	Score	**12%**	**10%**	**15%**	**18%**
15%	**Construction Impacts**	Major	Minor	Minor	No impact
		Major impact, no ice facilty available in Welland for 18 months or so during any construction scenario	As parking lot shared with Empire Sportsplex- some impact to Sportsplex access	Removal of a T ball court and community green space	Greenfield site. As it is presumed previously undisturbed, Archaeological Stage 1 report required.
	Score	**5%**	**10%**	**11%**	**14%**
15%	**Environmental Impacts**				
	Ability to create a low carbon sustainable facility	Low ability to create a sustainable facility as there is minimal insulation	Net Zero Emissions Facility Possible	Net Zero Emissions Facility Possible	Net Zero Emissions Facility Possible
	Renewable energy potential	No solar PV potential, sloped roofs	Solar PV potential on large rooftops	Solar PV potential on large rooftops	Solar PV potential on large rooftops
		Existing low efficiency refrigeration plants			
	Score	**0%**	**15%**	**15%**	**15%**
100%	**Total Score**	**42%**	**60%**	**86%**	**97%**

KEY DECISION #3 - SITE LOCATION

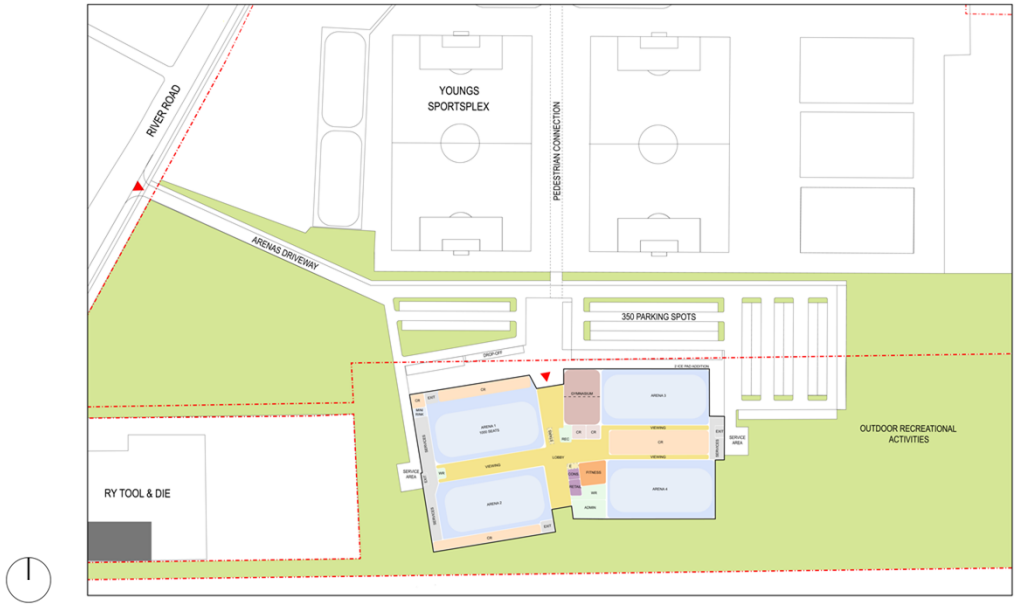
- **It was recommended to further develop the 482 River Road site, as it has the highest site analysis score.**

HIGHEST RANKING SITE - CONTEXT

- 2 pad with 4 pad expansion, multi-purpose sports centre
- Can be built all at once or phased construction
- Proposed entrance aligns to Youngs Sportsplex Entrance, with a pedestrian connection
- Unique integrated Sports Campus is created, multi-seasonal
- 350 parking spaces plus Youngs Sportsplex 200 spaces as overflow
- Future outdoor recreation space possible

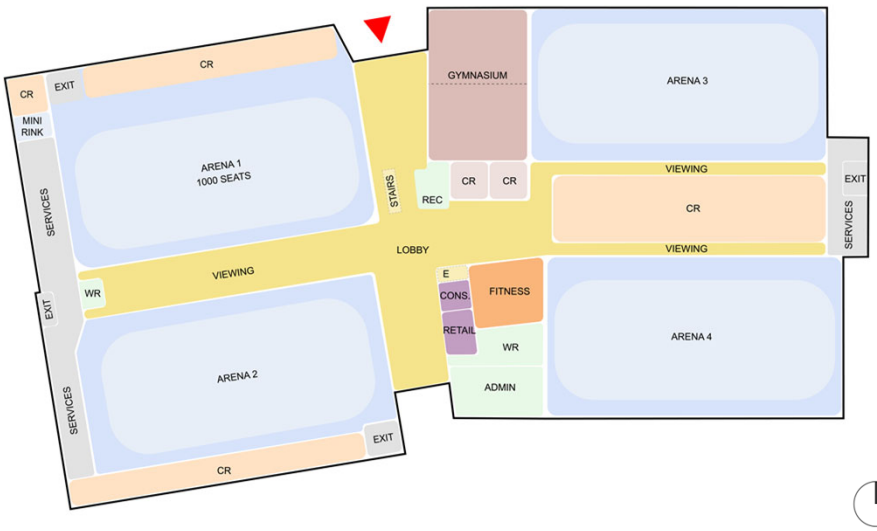


HIGHEST RANKING SITE - SITE PLAN



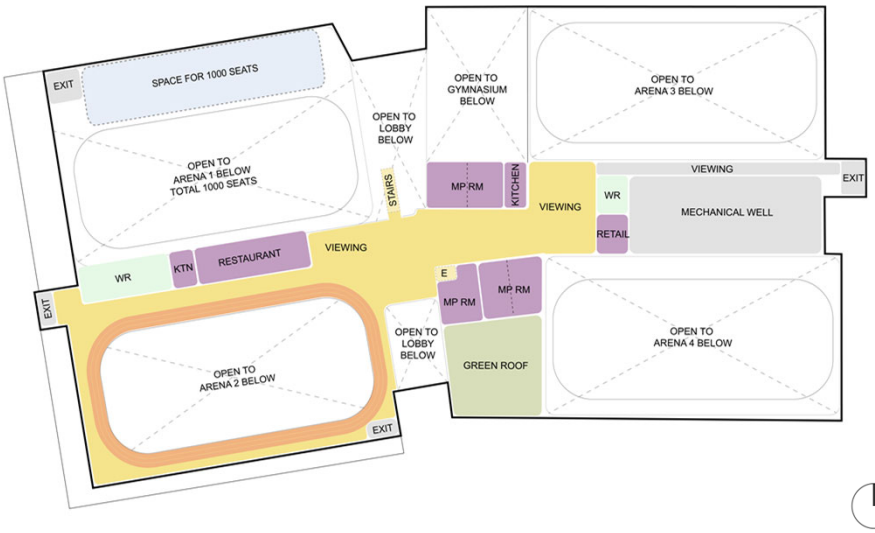
HIGHEST RANKING SITE - GROUND FLOOR

- 'Cloverleaf' configuration for more efficient circulation and view to all arenas
- Arena 1 has 1000 seats plus standing room
- Arena 2,3,4 have approximately 200 seats
- Divisible Gymnasium, Retail, Concession and Administration on ground floor
- Change rooms shown on outside of pads for main arenas, more warm side viewing
- Fitness close to Gymnasium, can share change rooms



HIGHEST RANKING SITE - SECOND FLOOR

- Arena 1 has 1000 seats spanning from ground to second, with standing room at top
- Licensed restaurant space with direct views over Arena 1
- 200m 3 lane Walking/Running Track over Arena 2
- Multi-Purpose Rooms and Community Kitchen



SUMMARY OF RECOMMENDATIONS

Key Decision #1

- Current population benchmarks indicate a three pad is required. Future demands are tracking towards the need for 4 pads for Welland within the next 10 years. Therefore the Feasibility Study recommendation is to provide a site with the capacity for a 4 pad facility design.

Key Decision #2

- As a 4 pad and adequate parking will not fit on the existing site, a new location should be selected for ideal program and amenity synergies, and operational and staffing efficiencies (ie one refrigeration plant instead of two).

Key Decision #3

- It was recommended to further develop the 482 River Road site, as it has the highest site analysis score.

CS&P Architects

City of Welland

DISCUSSION AND FEEDBACK

This is what the data is saying, what do you think?
We welcome your feedback today.

The ideas, concerns, and information gathered today will be used to inform and validate the proposed direction. The background material, preferred site, and market analysis will be presented to Council in March 2025. The feasibility study will be completed after the Council Meeting, in Q1 2025.

Next Steps
Once the Arena Feasibility Study has been reviewed by Council, the next steps will be addressed through the capital budget process. This will ensure that any recommendations and findings are considered in the planning and allocation of resources for future developments.

CS&P Architects

CITY OF Welland