



Goshen Pavilion and Ice Rink Market Demand, Financial, Feasibility, and Impact Analysis

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Executive Summary

The Hunden Strategic Partners team, including sports architects from Sink Combs Dethlefs, was engaged to assess the market demand and financial feasibility of a new year-round, multi-purpose pavilion and ice rink (Project) to be located in downtown Goshen, Indiana. The city is considering the Project to promote the overall quality of place, meet the current and future needs of the community, and promote cross-seasonal tourism. Through the analysis, the HSP team determined the overall needs of the proposed facility, as well as development costs, operating models, and economic impact. The key questions HSP was tasked to answer were:

- What is the proposed project? Where is the proposed site? What are the programming opportunities for such a complex?
- What is the local and regional supply of sports and entertainment facilities? What is the local demand for a covered ice rink/pavilion in Goshen? Who would be the primary users? Where are sports and entertainment events currently being held in the market?
- What is the ideal site configuration for the complex? What is the probable cost? What are the demand and financial projections for the proposed project? What is the projected economic, fiscal, and employment impact due to the project?

HSP's analysis indicates that the proposed Project will have a variety of positive impacts on the Goshen community. The venue will provide a covered location for a number of events and types of events that cannot currently be accommodated or hosted in Goshen. This includes all ice activities, such as public skating, figure skating, classes, and hockey, as well as covered concerts, weather protected festivals and events, consumer shows, receptions, and non-ice sports and recreation such as basketball, volleyball, pickleball, and cheerleading. The facility will also allow existing events, such as First Fridays and other festivals, to expand and have a "home base" especially during inclement weather. The pavilion will provide a sense of community for a burgeoning downtown and city, as well as induce visitation from outside of Goshen. The Project's open space component also presents opportunities to partner with activities and events to create new opportunities and expand the offerings of the Parks and Recreation Department with regards to programming and facilities. Overall, HSP's market analysis suggests that the proposed Project will enhance the quality of life in Goshen as well as visitation and new residential growth to Indiana from neighboring states, especially given Goshen's proximity to Michigan and easy access from Illinois and Ohio.

Chapter 1

Project Overview

Project Profile

The proposed project is an outdoor, covered pavilion that will serve as an ice rink in the winter months and flexible events space throughout the spring, summer, and early fall. In addition to the pavilion structure, the Project also plans to feature supporting amenities including a concessions/skate rental building, restrooms, and limited parking. The project aims to be utilized in a number of ways to serve the Goshen community and generate economic impact from the outside area. Construction on the project is expected to begin in June of 2018. This start date would allow for completion of the project by the end of 2018, in time to begin operations in January 2019.

SITE

The proposed project is located at 311 W. Madison St. This selected site is 9 acres of open greenspace on the former brownfield site (shown in red). The site is located approximately three blocks (6-minute walk) from the Main Street corridor in downtown Goshen. Located along the Historic Mill Race Canal, the project will be located adjacent to the renovated Hawks Building and future development along the canal. The site is 0.3 miles south of the Goshen Brewing Company and the city-owned parking lot, which will likely act as the primary lot for the complex. Currently, vehicular access to the site is limited.

HSP's analysis suggests that the site, while somewhat hindered by accessibility, will benefit from proximity to the downtown area and development occurring along the canal.



Programming Opportunities

The proposed Pavilion will function as a flexible, multi-use complex throughout the entire year. The simplicity of the complex will allow the facility to host a variety of events, both in the winter and warmer months. Potential programming options for the complex include the following:

WINTER

Open Skate: The facility is expected to be open daily to members of the community for open skating.

Skating Programs: There is opportunity for the complex to offer learn to skate/play hockey programs for Goshen youth participants that may be introduced to the activity.

Hockey: While conversations with Goshen community stakeholders indicated that the focus of the complex will be on the community, and not on hockey teams/leagues, there will be opportunity for 'pick up hockey' for local citizens looking to play.

Tournaments/Events: There is currently not a major appetite for hosting hockey tournaments in the Pavilion, but a unique complex will be in demand for regional clubs.

Rentals: Local corporations and organizations will have the opportunity to rent the venue for team building or social events,

WARMER MONTHS

Community Events: The primary function of the complex will be to enhance existing community events and potential create new ones. The concrete floor pavilion will be able to host community concerts, farmers markets, movie nights, flea markets, arts festivals, and grill-outs.

Banquets/Receptions: There is opportunity for the complex to be rented for private events including weddings, family reunions, parties, and other receptions.

Roller Hockey: In addition to ice hockey, the complex is designed to host roller hockey events in the warmer months.

Other Sports: Comparable complexes throughout the country have installed a 'sport court' over the concrete floor during the non-ice months. This allows the complex to host a variety of sports including basketball, pickleball, volleyball, badminton, dance, and cheer.

Chapter 2

Economic, Demographic, and Tourism Analysis

Region



Population

Although it is leveling off, the population of Goshen has grown since 1990. The percent change from 2000-2016 is about half as much as the United States, but fairly consistent with the state of Indiana.

Population and Growth Rates					
	Population				Percent Change
	1990	2000	2010	2016 Estimate	2000 - 2016
United States	248,709,873	281,421,906	308,745,538	323,127,513	14.8%
State of Indiana	5,544,159	6,080,485	6,483,802	6,633,053	9.1%
South Bend-Elkhart-Mishawaka CSA	656,287	707,063	720,647	725,087	2.5%
Elkhart-Goshen MSA and Elkhart County	156,198	182,791	197,559	203,781	11.5%
Goshen	24,299	29,850	31,719	32,110	7.6%
City Pop. As % of CSA	3.7%	4.2%	4.4%	4.4%	--

Source: U.S. Census Bureau

Employment

The top employment industry for Elkhart County is manufacturing at over 40% of the total employment. Of the top nine employers in Goshen, six are in the manufacturing industry. The revitalization of the RV industry has had a major positive impact on the entire county.

Goshen Major Employers		
Company Name	Industry	# of Employees
Lippert Components, Inc.	Manufacturing	3,400
Forest River Inc	Manufacturing	3,000
Keystone RV	Manufacturing	3,000
Dutchman Manufacturing	Manufacturing	2,000
Indiana University Health Goshen	Health Care	1,517
Goshen Community Schools	Education	1,442
Supreme Industries Inc	Manufacturing	1,200
MasterBrand Cabinets, Inc	Manufacturing	850
Oaklawn	Health Care	600

Source: Goshen Chamber of Commerce

Elkhart County Employment by Industry - 2015

Description	Employees	Percentage of Total
Total employment	152,475	100%
By industry		
Farm employment	1,743	1.1%
Nonfarm employment	150,732	98.9%
Private nonfarm employment	141,391	92.7%
Manufacturing	61,987	40.7%
Retail trade	12,121	7.9%
Health care and social assistance	11,703	7.7%
Administrative and support and waste management and remediation services	7,378	4.8%
Accommodation and food services	7,352	4.8%
Wholesale trade	7,029	4.6%
Other services (except public administration)	6,780	4.4%
Transportation and warehousing	4,884	3.2%
Construction	4,822	3.2%
Real estate and rental and leasing	4,157	2.7%
Professional, scientific, and technical services	3,660	2.4%
Finance and insurance	2,937	1.9%
Management of companies and enterprises	2,139	1.4%
Educational services	1,823	1.2%
Arts, entertainment, and recreation	1,218	0.8%
Information	696	0.5%
Utilities	143	0.1%
Mining (D)	(D)	--
Forestry, fishing, and related activities	(D)	--
Government and government enterprises	9,341	6.1%
State and local	8,464	5.6%
Local government	8,229	5.4%
State government	235	0.2%
Military	617	0.4%
Federal, civilian	260	0.2%

(D) Not shown to avoid disclosure of confidential information, but the estimates for this item are included in the totals
 Source: Bureau of Economic Analysis, Hunden Strategic Partners

Education

Aside from those that did not complete high school, the educational attainment levels for those in Goshen is fairly consistent with the county and state as a whole. Goshen's own college brings just under 900 students to the area, while neighboring colleges and universities account for a total of over 20,000 students in the area.

Educational Attainment - 2015

Population Age 25+	United States	Indiana	Elkhart County	Goshen
Did Not Complete High School	13.3%	12.2%	19.2%	24.0%
Completed High School	27.8%	34.6%	36.9%	32.4%
Some College	21.1%	20.9%	19.6%	17.4%
Completed Associate Degree	8.1%	8.2%	6.2%	5.0%
Completed Bachelor Degree	18.5%	15.4%	12.3%	13.0%
Completed Graduate Degree	11.2%	8.7%	5.8%	8.1%

Source: U.S. Census Bureau

Elkhart Area Colleges & Universities

Institution	Location	Distance (miles)	Highest Degree Offered	Enrollment
Goshen College	Goshen	0	Master's	870
Anabaptist Mennonite Biblical Seminary	Elkhart	7.9	Master's	99
Bethel College-Indiana	Mishawaka	17.9	Master's	1,639
Indiana University-South Bend	South Bend	21.9	Master's	7,185
Holy Cross College	Notre Dame	22	Bachelor's	618
Saint Mary's College	Notre Dame	22	Doctorate	1,701
University of Notre Dame	Notre Dame	22	Doctorate	12,393

Grand Total

21,897

Source: National Center for Education Statistics

Income

Goshen's homeownership rate and median household income are lower than the county, state, and country. There is however a value for retail sales per capita that is double those at county, state, and country levels. This highlights the positive tourism potential for the area.

Income, Spending and Other Demographic Data

Category	United States	Indiana	Elkhart County	Goshen
Homeownership rate, 2011-2015	63.9%	69.0%	69.5%	56.0%
Median value of owner-occupied housing units, 2011-2015	\$178,600	\$124,200	\$124,000	\$111,500
Persons per household, 2011-2015	2.64	2.55	2.80	3.61
Median household income, 2011-2015	\$53,889	\$49,255	\$47,913	\$41,117
Persons below poverty level, percent	13.5%	14.5%	14.0%	22.6%
Total employment, 2015	124,085,947	2,660,503	123,927	--
Total employment, percent change, 2014-2015	2.5%	2.2%	5.0%	--
Retail sales per capita, 2012	\$13,443	\$13,133	\$12,255	\$24,303

Source: US Census Bureau

Tourism

Key tourism generators in the region include:

- **Fidler Pond Park:** Ranked by TripAdvisor as the number one thing to do in Goshen, Fidler Pond Park is a 100 acre park with an 80 acre pond. The pond offers kayak, pedal boat and fishing rentals. In addition there is a popular walking trail and the rentable open-air Chiddister Pavilion.
- **Found Art Gallery:** Found Art Gallery is a collection of art from around the world. The owners travel to various countries and purchase hand-woven, hand-painted and hand-crafted works to display in their store. Visitors can shop, or simply admire the work.
- **Break Free Escapes:** This escape room in Goshen was ranked number eight by TripAdvisor for things to do. The venue features four unique escape games that can be enjoyed by groups of various sizes.
- **Beer & Wine:** Goshen offers a variety of breweries and wineries to get visitors coming back year-round. In addition to Gateway Cellar Winery, Goshen Brewing Company, Back Alley Brewery (connected to Gateway), and Thomas-Stieglitz Brewing Company offer unique and local flavors to the community.

Attractions	
Facility	Category
Kercher's Sunrise Orchard	Orchard
Pumpkinvine Nature Trail	Hiking Trails
Goshen Art House	Theater
Fidler Pond Park	Park
Found	Art Gallery
Break Free Escapes	Escape Room

Source: Amish Country

Analysis of the existing tourism and attraction assets of Goshen indicated that the area offers a variety of destinations ranging from parks and trails to theaters and art galleries. While many of the attractions can be used year-round, the majority of parks and trails are only activated during the summer months. A covered pavilion in Goshen offers the potential of programming during the winter months. Retail is a viable option during the colder months, but does not engage the community as much as larger events potentially could.

Events & Festivals

River Bend Film Festival – The film festival lasts for three days each summer and usually features between 50 and 70 submissions from local, regional, and sometimes worldwide filmmakers. The event, located at Art House and historic Goshen Theater, also has offered classes and workshops.

Arts on the Millrace – One of the most anticipated art events of the year is located between the Powerhouse Station and the Hawks Building with the focus of keeping visitors downtown. Art ranges from woodworking to stained glass and sculptures. Throughout the day various musicians perform, while food vendors, beer and wine are offered to visitors.

First Fridays – First Fridays have been around for some time in Goshen, and they offer monthly festivals for residents and visitors alike. All events are free to the public and are intended to show off all that Goshen has to offer. Examples of festivals include VolksFest, CornFest and Hometown Holiday.

Goshen Area Events	
Event	Month
Arbor Day Celebration	April
Mayor's Bike Ride	May
Beautify Goshen Week	May
Mother-Son Jammin' Fun!	May
River Bend Film Festival	May
Arts on the Millrace	June
Fidler Pond's Fantastic Fishing Derby	June
Outdoor Movies in the Park	June - July
America's Freedom Fest	July
Air Supremacy over Goshen	July
Kids' & Teens' Try-Athlon	July
Sprint Triathlon and Mile Swim Event	August
First Friday's	Year Round

Source: City of Goshen

The table above lists some of the major events that occur in Goshen on an annual basis, according to Goshen Parks and Recreation. Analysis of the calendar indicates that, outside of Fast Fridays which are year round, there is a lack of activity in the community in the winter months. Nearly ever major annual event occurs between the months of April and August during peak tourism season.

Chapter 3

Local and Regional Sports and Entertainment Analysis

Local Market Analysis

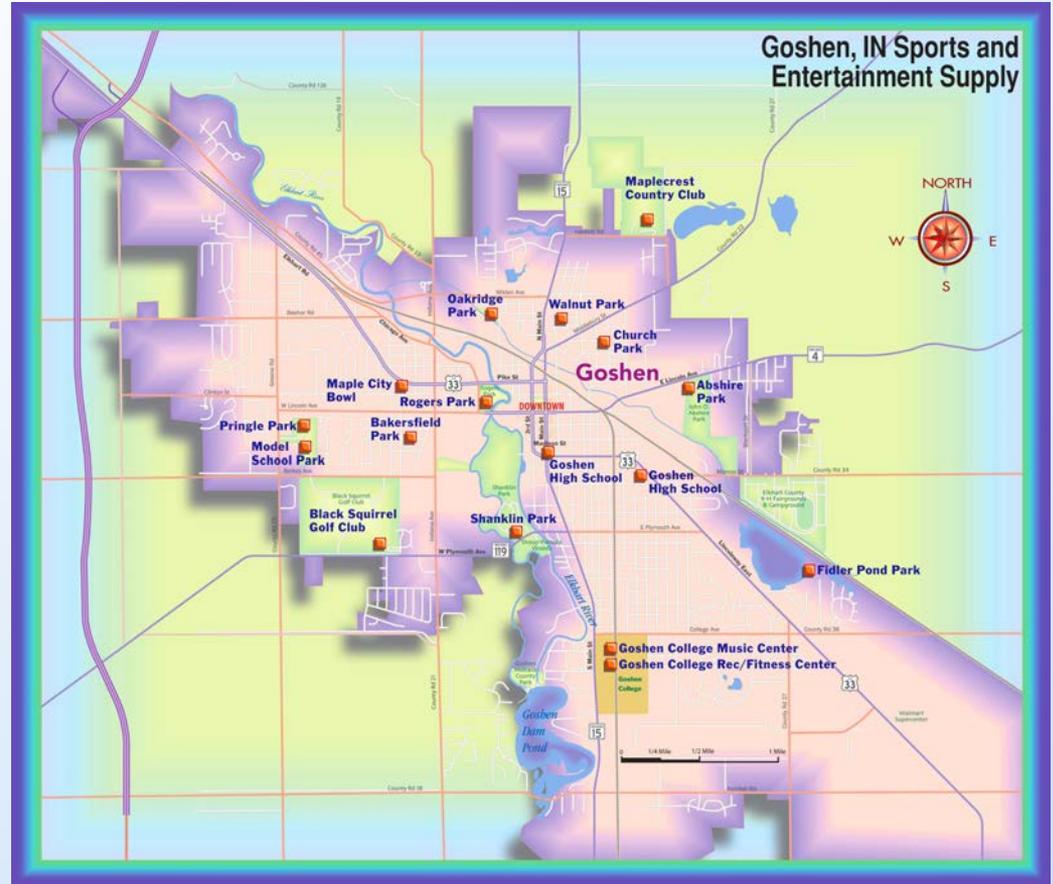
Analysis of the Goshen existing local supply of facilities indicated that while there are several outdoor parks and courts, there is a lack of facilities to be used in the winter months. Although there are several existing pavilions, many lack the size or indoor amenities to compete with others in the region. There is also a lack of parks that offer the combination of a pavilion, parking, lawn space, and a covered support building.

Goshen Local Sports and Entertainment Supply	
Name	Features
Abshire Park	Rentable enclosed pavilion
Bakersfield Park	Basketball court
Black Squirrel Golf Club	Golf Course
Church Park	Basketball court
Dykstra Park	Lighted basketball court, shuffleboard court
Fidler Pond Park	Rentable open-air pavilion
Goshen College Music Center	Concert Hall, Recital Hall, Instrumental Hall
Goshen College Rec-Fitness Center	Gymnasium and fitness facilities
Goshen High School	Local High School
Goshen Theater	Performing arts and concert venue
Maple City Bowl	Bowling Alley
Maplecrest Country Club	Golf Course
Model School Park	Outdoor pickleball courts
Oakridge Park	Lighted basketball court
Pringle Park	Youth soccer fields, sand volleyball lots, Large rentable open-air pavilion with kitchen
Rogers Park	Large historic pavilion, lighted basketball court, lighted baseball diamond
Shanklin Park	Lighted baseball/softball diamonds, large rentable enclosed pavilion, pool
Walnut Park	Softball field, basketball court, splash pad

Source: Goshen Parks and Recreation, Hunden Strategic Partners

Local Market Analysis

The figure to the right shows the local supply of sports, entertainment, and event facilities in Goshen. Conversations with local stakeholders indicated that existing parks/facilities are adequate for some events, but a new, high-quality flexible Pavilion would allow for the creation of new events and the expansion of existing events.



Regional Competitive Supply

Regional Ice Supply					
Name	Location	Indoor / Outdoor	Surfaces	Owner	Notes
The Ice Box Skating Rink	South Bend	Indoor	2	South Bend Youth Hockey (nonprofit)	Pro shop, concessions
Compton Family Ice Arena	South Bend	Indoor	2	University of Notre Dame	5,022 capacity, scoreboard, concessions, locker rooms
NIBCO Water & Ice Park	Elkhart	Outdoor	1	City of Elkhart	Ice loop, splash pad, pavilion
Merrifield Ice Rink	Mishawaka	Outdoor	1	Mishawaka Parks & Recreation	Lighted with boards, special community events
Howard Park Ice Rink	South Bend	Outdoor	1	City of Southbend	New rink expected to open 2017

Source: Various sources, Hunden Strategic Partners

Analysis of the regional market indicates that there are five competitive ice hockey venues located within 50 minutes of downtown Goshen. The Compton Family Ice Arena is the premier hockey complex and indoor entertainment venue in the region. The Compton Family Ice Arena is located about 40 miles from downtown Goshen and features two indoor ice surfaces. The Ice Box Skating Rink also features two indoor surfaces, while the Merrifield and Howard Park Ice Rinks have only one outdoor surface. The NIBCO Water & Ice Park has one less traditional outdoor ice track.

Regional Competitive Supply

Because the facility does not intend to be a destination for hockey clubs, tournaments, and events, the proximity of competitive regional hockey complexes will not play a significant role in the market opportunity for the pavilion. Currently, Goshen residents looking to skate in the winter months are traveling 25 minutes north to Elkhart in order to find some ice time.



The Ice Box Skating Rink South Bend, Indiana

Opened: 1975 (expansion in 1999)

Construction Cost: n/a

Owned by: City of South Bend

Operated by: South Bend Youth Hockey, Inc.

Ice Season: Year-round

Non-Ice Season: n/a

City of South Bend Population (2016): 101,735

St. Joseph County Population (2015): 268,441

South Bend was home to youth hockey in 1968 with the Notre dame Athletic and Convocation Center. The Ice Box was the second rink to open in the city in 1975. The second sheet of ice was added in 1999 at a cost of \$2.5 million. The facility is open year round and is host to several youth hockey team practices, tournaments, figure skating, broomball and public skating opportunities. The facility has a full concession stand, as well as a full service pro shop.



Compton Family Ice Arena South Bend, Indiana

Opened: 2011

Construction Cost: \$50 million

Owned by: University of Notre Dame

Operated by: University of Notre Dame

Ice Season: Year-round

Non-Ice Season: n/a

City of South Bend Population (2016): 101,735

St. Joseph County Population (2015): 268,441

The arena features two indoor ice surfaces. The Charles "Lefty" Smith Rink is host to the University of Notre Dame hockey teams and has a total capacity of 5,022. In addition, the auxiliary arena has 350 seats. The facility features locker rooms, restrooms, concessions, a media center, and a 15' by 15' Daktronics scoreboard hung from center-ice. The main rink also features an Irish Pub themed premium seating area called O'Brien's. The facility is named after its lead donors – Kevin and Gayla Compton, who are also part owners of the NHL's San Jose Sharks.



NIBCO Water & Ice Park

Elkhart, Indiana

Opened: n/a

Construction Cost: n/a

Owned by: City of Elkhart Parks & Recreation

Operated by: City of Elkhart Parks & Recreation

Ice Season: Dec – Feb (Subject to change)

Non-Ice Season: Mar – Nov (Subject to change)

City of Elkhart Population (2016): 52,221

Elkhart County Population (2015): 203,474

During the winter months, the NIBCO Water & Ice Park offers an ice rink and path for visitors. The park also has a warming house, restrooms, concessions and trainers for those learning to skate. During the non-ice season, the park serves as a splash pad with water features. In addition, there are pavilions and covered areas that may be rented for various events.



Merrifield Ice Rink Mishawaka, Indiana

Opened: n/a

Construction Cost: n/a

Owned by: City of Mishawaka

Operated by: City of Mishawaka

Ice Season: Dec – Feb (Subject to change)

Non-Ice Season: Mar – Nov (Subject to change)

City of Mishawaka Population (2016): 48,679

St. Joseph County County Population (2015): 268,441

The Merrifield Ice Rink offers various open skate hours throughout the winter months. Visitors can also purchase season passes, receive lessons and rent skates. Some of the special events at Merrifield Rink include Family Night, Veterans Appreciation Night, New Year's Eve Celebration, Valentine's Day, DJ Nights, Cartoon Skates, and School Field Trips. The rink can also be rented out by the hour for group events, birthday parties, and youth hockey teams.



Howard Park Ice Rink South Bend, Indiana

Opened: 1957, reopening 2017

Construction Cost: n/a

Owned by: City of South Bend

Operated by: City of South Bend

Ice Season: Dec – Feb (Subject to change)

Non-Ice Season: Mar – Nov (Subject to change)

City of South Bend Population (2016): 101,735

St. Joseph County Population (2015): 268,441

Howard Park Ice Rink is part of a larger park that includes restrooms, picnic tables, playgrounds, trails and a recreation center. The rink itself has been open for almost 60 years and is full-sized with boards. The new rink is expected to be open in the winter of 2017.



Stakeholder Feedback

City of Goshen Representatives

- The proposed facility will likely be owned by the City of Goshen.
- The proposed facility should be as multi-purpose as possible and the design should reflect the City of Goshen in that there is an emphasis on quality and locality.
- The parks & recreation department is well established within the community and will likely contribute to programming the proposed facility with camps in the summer and winter. There is also thought to be opportunity for introductory ice classes where kids learn how to skate and play hockey then graduate to play elsewhere on a full sheet of ice.
- It is important that the proposed facility features a kitchen and that alcohol is allowed on the premises. This will be important in attracting private events such as weddings and corporate outings. (Alcohol would be limited to private social events)
- The proposed facility has the ability to serve as an incubator for new and expanded events such as the film festival and local arts groups.

City of Goshen Representatives

- There is demand for a larger, public gathering space able to accommodate weddings, private events, reunions, and company outings in warmer months. Currently, the largest public facilities within the City include the 250-capacity Schrock Pavilion and the 100-seat Fiddles Pavilion.
- There is trepidation about developing a full sheet of ice for hockey as it may crowd out public skating. The ultimate desire is for the proposed facility to be a community asset.
- The proposed facility is viewed as an opportunity to expand a number of existing camps, festivals, and events. These events include Discovery Day Camp, outdoor art camps, yoga in the park, and movies in the park.
- The proposed site may not be able to accommodate adequate parking due to limited access.
- It is also important to preserve existing greenspace at the site.

Stakeholder Feedback

Other Community Stakeholders

- The proposed project has been seriously discussed four times by the City but the prior three discussions have not resulted in the development of a facility.
- The community would like to see the facility operate at a profit.
- There is an opportunity for outdoor events in the community, including movie nights and concerts. Flea markets and community garage sales present additional opportunity.
- There is continued concern that the development of a full ice sheet would result in the crowding out of open skate by hockey groups, but it may be worth the investment. The city can always say no.
- There is desire from the community for an outdoor event venue capable of housing movie nights and other outdoor events.

Stacy Bowers, Goshen Health

- Potential for wellness activities with children, adults and families.
- Very supportive of the project
- Parking is a general concern, especially for older adults. Would like to see some sort of clear walking path
- Goshen Health sees the project as a potential to compliment existing events such as Get Up and Goshen. Could have vendors set up in the pavilion. Goshen Health has also held yoga in the park, and a pavilion could compliment this event as well.
- The project could have potential for educational classes on a regular basis during the non-ice season. This would be a great opportunity to teach families how to be active with their kids.
- Does not necessarily see significant ice opportunity as most Goshen residents are inside during the winter months.
- They would be willing to pay a rental fee to use the pavilion.

Stakeholder Feedback

Kevin Deary, Boys & Girls Club

- Potential users of the proposed facility would include skating classes and various youth sports and activities.
- The Boys & Girls Club currently has a gym, but space is restricted.
- They would love to see roller skating take off. The project would also be a great opportunity to grow hockey, as some people spend money to travel 150-miles to play.
- As a community, Goshen would likely bring small businesses, receptions, birthday parties and various concerts to the proposed facility. The pavilion would need to be owned by the city.
- Security will be very important and the pavilion should be well lit.
- Depending on the cost, can envision utilizing the complex once a month in the summer and every other weekend in the winter
- A full sheet of ice should be considered.

Jesse Sensenig, Goshen Brewing Co.

- The proposed project will likely bring people downtown and benefit local businesses.
- The brewery already hosts concerts and utilizes indoor seating, as well as a fenced in outdoor area that fits up to 350 people. The parking lot is used for larger concerts.
- Goshen Brewing likely wouldn't utilize the complex for events, but would consider it for a larger event.
- The location for the proposed project is good, and there is opportunity to host larger outdoor festivals and events.
- The project could be a good addition to Goshen Theater and the Ignition Music Garage.

Stakeholder Feedback

Brad Hunsberger, La Casa/Hawks Developer

- Completed restoration of the Hawks building – fully supportive of the project.
- There could certainly be more plays, concerts and events if the proposed facility were to be developed. The barrier to entry is significantly lower when there is already an existing plug-and-play facility.
- Although the breweries host events, the proposed project would allow for these events to increase in size.
- In a perfect world, the project would be as simplistic as possible – small band shell with handicap parking, bathrooms and power.
- Does not necessarily see a significant market for ice skating or hockey, but is not familiar with the sport.
- For First Fridays – It would be nice to have a venue that does not need to be set up every month.
- Fencing is critical for ticketed events and alcohol.

Adrienne Nesbitt, Event Coordinator - Goshen

- Currently the biggest obstacles are bathrooms, power and water. These issues would be simple to fix.
- Alcohol (for private events) and concessions would help tremendously, although there will likely need to be some sort of rough fencing around the area to comply with excise.
- Plan is to develop a new music festival in Goshen, this would be a perfect location
- Moving First Fridays to the proposed project may not be the best for downtown. The goal is to revitalize local business – want to avoid straying to far from the main streets.
- River Bend Film Festival has been held in the Goshen Theater, but there is opportunity to use a pavilion.
- Unsure of winter uses aside from open skate. There is currently a Fire & Ice Festival with ice carvings – similar events to this could work.
- Great opportunity for Arts on the Millrace

Stakeholder Feedback

Scott Sivan, Millrace Developer

- Sees the best use of the proposed project as an amenity for tenants.
- The location of the proposed project is great. Perfect setting of nature, fields and the canal while being almost walkable to downtown.
- The facility will need have an event planner to make sure that it is being properly programmed.
- The parking situation will need to work well.
- The development needs to be done right by an experienced developer. The pavilion needs to be used and controlled.

Felipe Moreno, Latino Advisory Council, Downtown Business Owner

- Sees special events as the main use or role for the proposed project.
- A pavilion would be a great addition to Goshen in terms of youth programming and improving downtown.
- If money will be spent on this project, it is worth investing in a full sheet of ice.
- Hockey should be a source of revenue, but it should not be the priority for this project. The facility could attract a hockey team that does not dwarf other community programs.
- This type of venue has some limitations. However, weddings, concerts and other events may draw in more people.

Chapter 4

Comparable Case Studies

Summary of Case Studies

Summary of Comparable Ice Pavilions						
Name	Location	Operator	Opened	Cost	City / Town Pop.	County Pop.
The Pavilion	Bend, OR	Bend Parks & Rec Department	2015	\$11.4	87,014	175,268
William E. Urschel Pavilion	Valparaiso, IN	Valparaiso Parks & Rec Department	2015	\$3.0	32,626	167,688
Loy E. Harris Pavilion	Manassas, VA	n/a	n/a	n/a	41,764	451,721
South Haven Ice Rink	South Haven, MI	City of South Haven	n/a	n/a	4,366	75,077
City of Longmont Ice Pavilion	Longmont, CO	City of Longmont	2003	n/a	92,088	604,546
Mohonk Mountain Resort	New Paltz, NY	Mohonk Mountain House Hotel	n/a	n/a	14,003	180,143
Average			2011	\$7.2	45,310	275,741

Source: Various Sources, Hunden Strategic Partners

Of the five case studies identified by HSP, one is operated by a private organization while the remaining balance are operated by the local municipality in which they are located. All venues offer seasonal ice and, on average, are open between November and March. All of the venues offer dual functionality and serve as flat floor event space in warmer months. When the ice is available, all venues primarily serve the local community and program youth / adult leagues, clinics & practices.

William E. Urschel Pavilion Valparaiso, Indiana

Opened: 2015

Construction Cost: \$3 million for Pavilion, \$8 million for entire complex

Owned by: City of Valparaiso

Operated by: Valparaiso Parks & Recreation Department

Ice Season: Winter

Non-Ice Season: Spring, Summer & Fall

City of Valparaiso Population (2015): 32,626

Porter County Population (2015): 167,688

The William E. Urschel Pavilion opened in 2015 and was part of an \$8 million overall expansion of Valparaiso's Central Park Plaza. The Urschel family pledged a \$3 million donation in honor of William E. Urschel to be used for construction and ongoing operations over a ten year term. The entire \$8 million expansion includes the development of a family center, storage space, restrooms and public area, in addition to the pavilion. The facility is used as an ice rink during winter and can be rented for \$125/hour and serves as a flat floor event space in spring, summer and fall. Renting the facility as a flat floor space costs between \$600 for non-profit organizations in off-peak times and \$1,450 for all other groups at peak. The pavilion hosted an estimated 250 events in the summer of 2016.



William E. Urschel Pavilion Valparaiso, Indiana

HSP reached out to William E. Urschel Pavilion management to better understand the facility and its operations. Key takeaways from that conversation included the following:

- The complex was developed as an addition to an adjacent park. The park typically hosted about 200 events between April and October, but would die in the winter months. Parks and recreation staff were constantly constructing temporary tents for events, and mayor determined that there was a need for a covered venue in the park.
- Because the rink is smaller than regulation-size, the focus of the venue in the winter months is on youth hockey. The rink is split in half for learn-to-skate and youth programs ranging from pre-school to 12 years old. The youth hockey league, which lasts three months, currently features 50 participants. Learn-to-skate, which is programmed on a monthly basis, typically features 20 to 30 participants per class and includes a \$60 registration fee per month.
- Outside of youth hockey and learn-to-skate programs, the facility focuses on public open skate, which results in the largest return on investments, according to facility management,
 - Birthday parties and corporate rentals typically occur throughout the weekends and on Monday and Tuesday evenings (the slowest time for open skate). On Friday evenings, the complex brings in a DJ and utilizes LED lighting to create a party-like atmosphere at the rink.
 - The complex, in its first year of operations, attracted 51,000 open skaters. In peak season, during the week, the complex can attract 300 to 400 skaters per day.
 - In the offseason, the complex is typically booked on Fridays, Saturdays, and Sundays throughout the spring and summer with wedding reception, fundraisers, and other private events. When inclement weather affects the concerts occurring at the adjacent amphitheater, the event is moved to the pavilion. Outside of weekly farmer's markets, the complex is not heavily utilized throughout the week. The facility is operated as a rental area, and not marketed towards outside events.
 - The facility receives \$65,000 a year in naming rights.

William E. Urschel Pavilion Valparaiso, Indiana

Winter Pricing and Programming –

The adjacent table shows the various price ranges and packages for the ice rink at the William E. Urschel Pavilion during the winter months. In addition to standard one-time admission, the rink offers 5-time, 10-time, and season passes to visitors. Skates, helmets, lockers, and skate aids can also be rented by the venue. Birthday parties allow for two hours of ice time for \$250. In addition to skating, packages include a party room, pizzas, cupcakes, skates for 15 guests and more. Renting out the pavilion for three hours of ice time costs \$390, and may be used by a local youth team, corporate event or any group looking to skate in a more private setting. The private ice rental also includes use of the sounds system, LED lighting, conference room and lobby. A skate sharpening service is also available for skaters of any level. Not shown in the table are various opportunities to learn how to skate and/or play hockey.

William E. Urschel Pavilion Winter Pricing

General Admission	
Skate Admission	\$5
Group Rate (includes skates)	\$6
Admission Passes	
5 Admission Booklet	\$40
10 Admission Pass	\$45
Individual Season Pass	\$125
Family Season Pass (up to 4 people)	\$250
Rental Items	
Skate Rental	\$3
Helmet Rental	\$3
Lockers	\$2
Skate Aid	\$3 + \$5/hr
Group Pricing	
Birthday Parties (2 hr)	\$250
Private Ice Rental (3 hr)	\$390
Extras	
Skate Sharpening	\$5

Source: Valpo Parks

William E. Urschel Pavilion Valparaiso, Indiana

Summer Pricing and Programming –

The adjacent table shows the various rates for renting out the William E. Urschel Pavilion during the non-ice months. As shown, pricing varies from prime time versus non prime time days. These prime time days are considered Friday through Sunday. In addition, non-profit organizations are given a significant discount which allows for a variety of organizations to utilize this event space. By allowing groups to rent supplies such as tents, tables, chairs and other miscellaneous items; the barrier to entry for hosting an event is decreased significantly. In addition to concerts, and other public community events, private events such as weddings and corporate outings are popular. Security is also available for by the hour for private events.

William E. Urschel Pavilion Summer Pricing

Pavilion Rental Options

Rate for Non-Prime Time*	\$1,150
Non-Profit Rate	\$600
Rate for Prime Time*	\$1,450
Non-Profit Rate	\$750

Additional Rental Options

Tents

20 x 20 High Peek White Tent	\$260
20 x 40 High Peek White Tent	\$400
Side Panels	\$32

Tables

8 ft Banquet Table	\$10
28" Bistro Table	\$11
60" Round Table	\$11

Chairs

Lifetime Folding Chair	\$1.25
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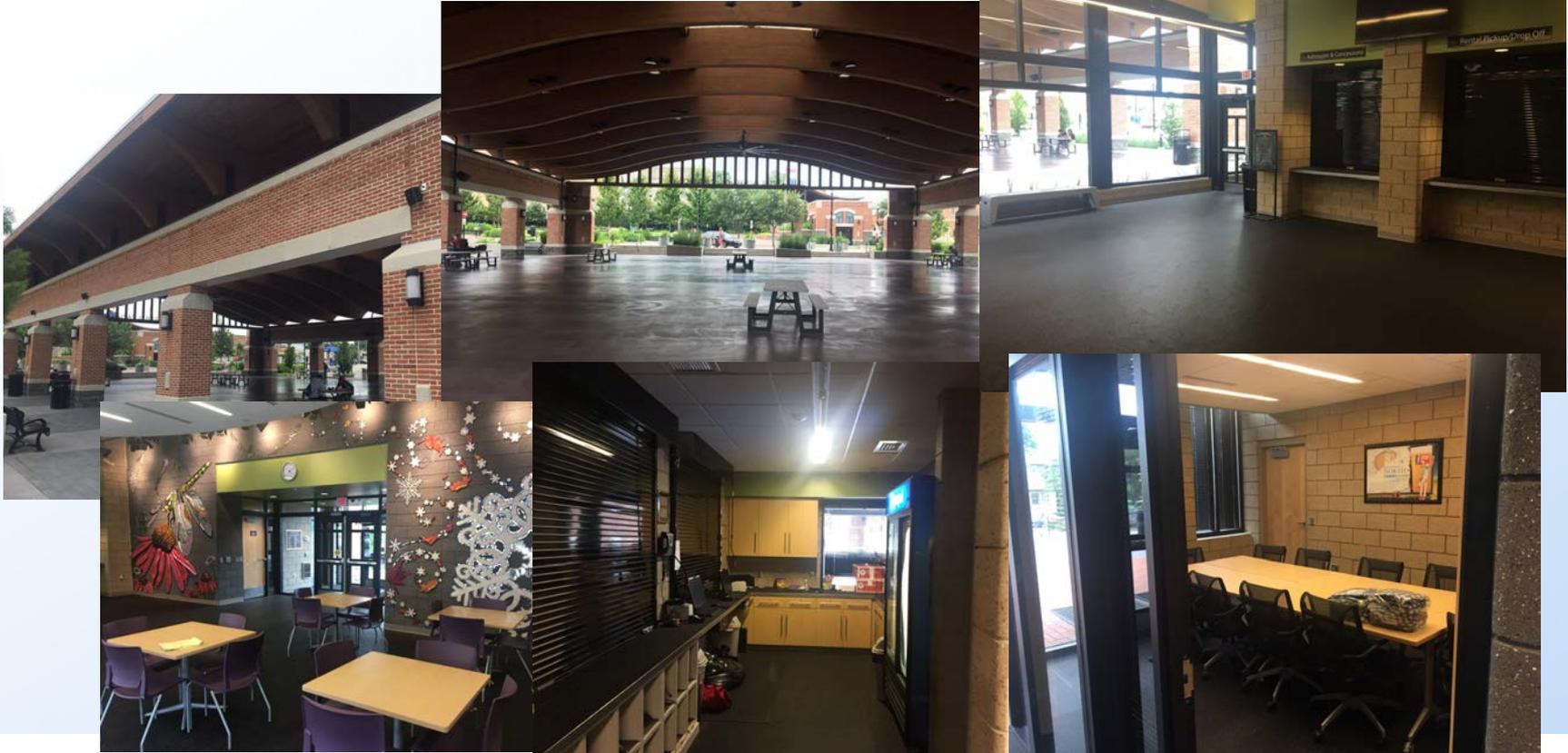
Misc. Items

Urschel Pavilion colored down lighting	\$175
Sound System with 1 wireless mic	\$250
Portable Stage 24' x 12'	\$300
Portable Stage 12' x 12'	\$150

*Prime Time: Fri - Sun

Source: Valpo Parks

William E. Urschel Pavilion Valparaiso, Indiana



William E. Urschel Pavilion

Valparaiso, Indiana

- While the complex is community oriented, there is a demand in the community for hockey. Open hockey occurs three nights per week in the winter from 8 to 11. Nets are lowered over each end for safety reasons.
- During the school year in the winter, the complex opens at 4 PM every day. Generating demand during school is difficult.
- The facility hosts approximately two private rentals per week and 1 field trip per week throughout the winter months.
- The venue hosts a community concert every Thursday and a farmer's market on Tuesdays and Saturdays. The complex also hosts outdoor movie nights on Wednesdays. These events are free to the public and generate very little revenue for the complex.
- Beer fests, art festivals, social events, banquets, and other private events are the primary revenue drivers for the complex in the summer months due to rental fees.
- Lockers are critical. While they are not necessary for hockey teams, many daily skaters need to put their belongings in a safe space.
- The facility conference room is utilized as a changing room, meeting space, and destination for birthday parties.
- Alcohol is allowed on the premises for private events, but the event must employ a security guard. Also, temporary barricades are consistently utilized for privacy reasons.
- Sports have been difficult for the complex due to the the floor conditions. The focus of the venue in the warmer months is on flat-floor events.
- After the first year, the public was frustrated with the lack of structured programming in the venue. Programming, including learn to skate programs, as added in the second year.

The Pavilion Bend, Oregon

Opened: 2015

Construction Cost: \$11.4 million (\$29 million voter approved bond measure)

Owned by: City of Bend

Operated by: Bend Park & Recreation District

Ice Season: October – April

Non-Ice Season: May – October

City of Bend Population (2015): 87,014

Deschutes County Population (2015): 175,268

The Pavilion is a municipal ice rink / pavilion serving the local community in Bend, OR. The facility was funded through a voter approved bond measure and its use fluctuates depending on the season. Between October and April, the facility offers ice activities while between May and October, the facility is surfaced with a sports court and offers activities like pickleball, volleyball and basketball. While the Pavilion is often programmed with youth and adult hockey / skate programs between October and April, the venue primarily serves the Pavilion Activity Club (PAC) a local day camp, between May and October. Recently, the Park District has begun experimenting with more adult leagues (volleyball / basketball) between May and October.



The Pavilion Bend, Oregon

While ice is down, the facility is consistently programmed with USA Club Hockey, learn to skate / play hockey, open skate, curling and adult hockey league activities. Recently, the Bend Parks and Recreation District formed its first youth hockey league as well as its first adult hockey league which features a twelve game season. The learn to skate / play hockey programs offer those without prior skating experience the opportunity to learn how to both skate and play hockey. Single visit through season passes are affordable and the facility offers skate rentals on-site. The Pavilion also offers curling activities in the form of leagues and open curl, or curl time, as it appears on the mock schedule below. In addition to on-ice activities, the venue also features a pro shop and café where participants can shop for all ice related gear as well as order hot, cold and beverage items. The venue is also available for hourly or daily rental. Daily rental of the venue costs between \$1,000 and \$1,500 for up to ten hours while hourly rental ranged between \$200 and \$300 per hour with a minimum of two hours.

2016-17 Ice Season Fee & Pass Schedule

	Without Skate Rental	With Skate Rental
Single Visit Pass		
Adult (19 - 59)	\$9	\$12
Older Adult (60 - 79) / Student	\$8	\$11
Youth (3 - 18) / Honored Citizens (80+)	\$7	\$10
Children Under 3 w/ Paying Adult	FREE	FREE
10-Visit Pass		
Adult (19 - 59)	\$72	\$96
Older Adult (60 - 79) / Student	\$64	\$88
Youth (3 - 18) / Honored Citizens (80+)	\$56	\$80
Season Pass		
Adult (19 - 59)	\$229	\$359
Older Adult (60 - 79) / Student	\$199	\$229
Youth (3 - 18) / Honored Citizens (80+)	\$169	\$199

Source: Bend Parks and Recreation

Sample Ice Schedule - The Pavilion (Bend, OR)

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
7:00 AM Adult Pick-Up Hockey	10:00 AM Flex Skate	6:00 AM USA Club Hockey	9:00 AM Flex Skate	9:00 AM Learn to Skate	6:30 AM Curling Time	6:30 AM USA Youth Club Hockey
8:30 AM USA Club Hockey	11:45 AM Adult Pick-Up Hockey	9:00 AM Learn to Skate	11:45 AM Adult Stick Time	11:45 AM Flex / Fitness Skate	9:00 AM Flex Skate	9:00 AM Learn to Skate
11:00 AM Family Skate	1:15 PM Flex Skate	11:45 AM Fitness / Flex Skate	1:15 PM Open Skate	1:15 AM Flex Skate	11:45 AM Adult Pick-Up Hockey	11:45 AM Learn to Play Hockey
1:15 PM Open Skate	4:00 PM Learn to Play Hockey	1:30 PM Curling Time	4:00 PM Learn to Play Hockey	4:00 PM Learn to Skate	1:15 PM Flex Skate	1:15 PM Open Skate
4:00 PM Curling League	6:30 PM Open Skate	4:00 PM Learn to Skate	6:30 PM Open Skate	6:30 PM USA Club Hockey	4:00 PM Youth Stick Time	4:00 PM USA Club Hockey
	8:15 PM Adult Hockey League	6:30 PM USA Club Hockey	8:15 PM Adult Hockey League	8:15 PM Adult Hockey League	5:15 PM Adult Stick Time	6:30 PM Open Skate
		8:15 PM Adult Hockey League			6:30 PM Open Skate	

Source: Bend Parks and Recreation, Hunden Strategic Partners

The Pavilion *Bend, Oregon*

HSP reached out to Pavilion management to better understand the facility and its operations. Key takeaways from that conversation included the following:

- The development of the facility came from a community needs assessment and the project was funded through a bond measure. There were a few small rinks in town, but there was a need for a flexible, covered pavilion.
- They begin making ice in mid-October and open on Halloween and operate with ice until May 4th.
- The facility is typically open from 5 AM until midnight. The facility currently offers a men's hockey league, which has more than 270 participants, and a youth hockey league, with more than 250 participants, in addition to the learn to skate programs and curling leagues.
- The facility has only hosted one hockey tournament to date. They are able and willing to host more, but the focus of the facility is the local community.
- Once the ice is melted, the concrete is cleaned up and a sport court is applied for basketball, volleyball, and pickleball use. The facility had originally planned to remove the dasher boards, but management decided to keep them up.
- The facility is open to the public on weekday afternoons for ping pong, corn hole, and skate park activities.
- Management is still working to identify efficient programming in the summer months, before school is out.
- Summer camp has been a major revenue generator for the complex. Once school is out, the venue attracts more than 150 kids each day. The camp lasts until Labor Day, and then conversion begins on October 7th.
- Corporate rentals typically occur on the weekend in the summer. The facility has hosted bar mitzvahs, car shows, wellness events, and other festivals. Daily rentals range from \$1,000 to \$1,500 per day.
- The complex utilizes an ETFE tarp that can be applied to the exterior of the pavilion. The tarp acts as sunscreen to the complex, and blocks wind as well. Management recommends a similar concept for a development in Elkhart

The Pavilion Bend, Oregon

The Pavilion's 2015-2016 performance and 2016-2017 estimated financials are shown in the table to the right. In 2015-2016, the venue was able to generate an operating profit of nearly \$60,000, resulting in a cost recovery of 110%. The top revenue generating line item is the open skate drop-in, followed by the summer camp that is hosted by the complex. Youth and adult hockey leagues, camps, and tournaments combine to generate 15 percent of the total revenue at the complex. Personnel services account for more than 67 percent of total operating expenses, while utilities account for ten percent. Conversations with representatives indicates that the utility expense of \$90,000 is comprised of \$60,000 in electrical expenses, \$14,000 for natural gas, \$18,000 for water, and \$4,500 for garbage. The \$666,000 in personnel expenses features approximately \$330,000 in program expenses. The remainder includes two-full time staff members and three part-time staff members.

The table below summarizes the total visits to the Pavilion in 2016. The venue attracted more than 35,000 total open-skate visits, including 4,600 visits from guests with a season or 10-day pass.

Visit Type	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Total
Unique Pass Visits	1,155	741	587	53	3	15	7	10	111	11	949	985	4,627
Pass Drop-In Visits	8,272	3,694	3,685	205	19	4	1	6	5	1	5,111	10,001	31,004
Total Visits	9,427	4,435	4,272	258	22	19	8	16	116	12	6,060	10,986	35,631

Source: The Pavilion (Bend, OR)

	2015-16 Actual	%	2016-17 Estimate	%
Operating Revenues				
Ice Drop-In	\$173,237	27%	\$219,249	23%
PAC Summer Camp	\$110,006	17%	\$180,000	19%
Adult Hockey	\$68,900	11%	\$96,385	10%
Food, Beverage & Merchandise	\$63,902	10%	\$75,027	8%
Skate Rental & Sharpening	\$58,514	9%	\$74,172	8%
Skate School	\$45,056	7%	\$52,500	6%
Season Passes	\$39,538	6%	\$28,728	3%
Youth Hockey	\$26,405	4%	\$45,162	5%
Ice Rental	\$23,500	4%	\$48,000	5%
Sponsorship	\$17,575	3%	\$37,755	4%
Other Ice Revenue	\$9,111	1%	\$63,779	7%
Other Sports / Leagues	\$7,300	1%	\$12,055	1%
Pavilion Rentals	\$1,250	0%	\$6,000	1%
Other	\$558	0%	\$4,675	0%
Total Operating Revenue	\$644,852	100%	\$943,487	100%
Operating Expenses				
Personnel Services	\$392,937	67%	\$666,924	73%
Utilities	\$58,611	10%	\$90,192	10%
Program Equipment & Supplies	\$45,435	8%	\$48,392	5%
Concession Supplies	\$29,120	5%	\$21,227	2%
Maintenance & Repair	\$22,620	4%	\$38,105	4%
Administration	\$16,610	3%	\$25,213	3%
Janitorial	\$12,037	2%	\$19,849	2%
Staff, Safety & Training	\$9,103	2%	\$4,800	1%
Total Operating Expense	\$586,473	100%	\$914,702	100%
Total Operating Revenue (Loss)	\$58,379		\$28,785	
Cost Recovery	110%		103%	

Source: The Bend Pavilion

City of Longmont Ice Pavilion

Longmont, Colorado

Opened: 2003

Construction Cost: n/a

Owned by: City of Longmont

Operated by: City of Longmont

Ice Season: Early November – Early March

Non-Ice Season: End March – End September

City of Longmont Population (2015): 92,088

Boulder / Weld County Population (2015): 604,546

The ice at the Longmont Ice Pavilion sits 165' x 65' and is located in Roosevelt Park. Like most seasonal outdoor pavilions, the facility offers open skate, learn to skate programs, adult pickup hockey leagues and youth hockey tournaments. In 2015, the pavilion attracted more than 40,000 skaters. One time admission to the ice rink costs residents between \$5 and \$6 depending on age, and costs non-residents between \$6 and \$7. Seasonal ice passes cost between \$44 and \$72 for residents and between \$55 and \$90 for non-residents. Families can purchase a seasonal pass for between \$167 and \$209 while couples can purchase a seasonal pass for between \$121 and \$152.



City of Longmont Ice Pavilion Longmont, Colorado

HSP reached out to Longmont Ice Pavilion management to better understand the facility and its operations. Key takeaways from that conversation included the following:

- The complex was not originally designed to include ice. The Pavilion was developed as a community asset, but the Mayor wanted to add ice and make the area a destination.
 - The facility, which features a 75 percent regulation sized-rink, ran as a public skate facility over its first few years, but demand for learn-to-skate, youth hockey, and adult hockey continued to grow. The complex now features an adult men's hockey league of approximately 100 participants and an internal youth league of 130 participants.
 - The complex competes with traditional indoor rinks in surrounding communities. The facility is able to attract users due to its proximity to certain communities, as well as its focus on beginning and recreation level hockey. The complex acts a home to many kids who also play on travel clubs in other hockey facilities throughout the market.
- The typical weekday includes open free skate, drop-in hockey, and rentals to the public through the morning and early afternoon hours. There is a brief open skate session after school, followed by youth hockey, adult hockey, and learn to skate programs. Private facility rentals typically occur on Friday and Saturday nights, and league games occur on Sunday.
 - While the complex does host one annual tournament for clubs in surrounding communities, the focus of the facility is on accommodating developmental local participants.
 - In the off-season, the venue is home to various events and concerts throughout the summer, but it is not programmed with daily activities or sports. The venue hosts approximately two to three events per months, including two to three large concerts. The complex is limited by a noise ordinance issued by surrounding communities.

City of Longmont Ice Pavilion Longmont, Colorado

The table to the right shows the operating revenues and expenses for the Longmont Ice Pavilion in 2015 and 2016. While the programming at the venue is not as robust as some of the other complexes, the financial performance shows how a covered pavilion can break even financially. Youth programs, open skate, and other ice programming at the complex account for more than 75 percent of all revenue. Consistent with other complexes viewed in this analysis, salaries and wages account for nearly 70 percent of total expenses.

	2015	%	2016	%
Revenues				
Ice Rink - Programming, Hockey & Skate	\$141,420	76%	\$134,311	75%
Ice Rink Rentals	\$40,701	22%	\$42,242	24%
Ice Rink - Concessions	\$3,690	2%	\$3,173	2%
Total Revenue	\$185,811	100%	\$179,726	100%
Expenses				
Salaries, Wages & Benefits	\$120,977	69%	\$126,221	66%
Insurance	\$19,709	11%	\$19,748	10%
Professional Contract Services	\$17,277	10%	\$17,400	9%
Supplies	\$8,809	5%	\$7,961	4%
Utilities	--	0%	\$7,195	4%
Maintenance & Equipment	\$2,737	2%	\$5,149	3%
General & Administrative	\$2,285	1%	\$5,281	3%
Other	\$3,373	2%	\$1,888	1%
Total Expense	\$175,168	100%	\$190,843	100%
Net Operating Profit (Loss)	\$10,643		(\$11,117)	
Cost Recovery	106%		94%	

Source: Longmont Ice Pavilion

South Haven Ice Rink *South Haven, Michigan*

Opened: n/a

Construction Cost: n/a

Owned by: City of South Haven

Operated by:

Ice Season: Nov – Mar

Non-Ice Season: Mar – Nov

City Population (2016): 4,366

County Population (2015): 75,077

The rink offers skating for all ages and skill levels from mid-November to mid-March. The rink is within walking distance to the variety of stores and restaurants downtown. Visitors can bring their own skates or rent them at the pavilion. The rink also features seasonal lighting and professional resurfacing of the ice. During the non-ice season the pavilion can be used for various events.



South Haven Ice Rink South Haven, Michigan

As shown, South Haven Ice Rink offers a variety of services in addition to daily and season passes. In addition to pre-slotted open skate times, the rink can be rented by the hour for team use, parties, and more. In addition to free skating, curling clubs and events such as a New Year's Eve party use the ice as well.

South Haven Ice Rink Rates

Day Pass	\$4
Skate Rental	\$4
Skate Sharpening	\$4
Curling	\$15
New Year's Eve Ticket	\$25
Season Pass	\$65
Ice Rental (per hour)	\$125

Source: South Haven Ice Rink

Loy E. Harris Pavilion Manassas, Virginia

Opened: n/a

Construction Cost: n/a

Owned by: City of Manassas

Operated by: Privately Operated

Ice Season: Nov – Mar (Subject to change)

Non-Ice Season: Mar – Nov (Subject to change)

City of Manassas Population (2015): 41,764

Prince William County Population (2015): 451,721

The Harris Pavilion is host to a variety of events both during the winter and summer seasons. The pavilion has set skating rates for individuals and groups. During the non-ice season, events include weddings, political rallies, and various festivals. The pavilion is located within walking distance of several restaurants and retailers in Manassas.



Loy E. Harris Pavilion Manassas, Virginia

The Harris Pavilion offers three different pricing options, including single visit passes, 10-day passes, and season passes. Skates must be rented separately, except for with a 10-day pass. Birthday parties and group skating can be purchased separately during non open-skate hours. For special events, the pavilion provides a quality sounds system as well as premium lighting options. In addition, lessons can be purchased for various sessions beginning in January.

2016 / 2017 Ice Season Fee & Pass Schedule

	Without Skate Rental	With Skate Rental
Single Visit Pass		
Adults	\$8	\$13
Children (10 and Under)	\$7	\$12
10-Day Pass		
Adults	\$70	\$70
Children (10 and Under)	\$60	\$60
Season Pass		
Adults	\$180	\$180 + Skates
Children (10 and Under)	\$170	\$170 + Skates

Source: City of Manassas

Mohonk Mountain House Ice Pavilion

New Paltz, New York

Opened: n/a

Construction Cost: n/a

Owned by: Mohonk Mountain House Hotel

Operated by: Mohonk Mountain House Hotel

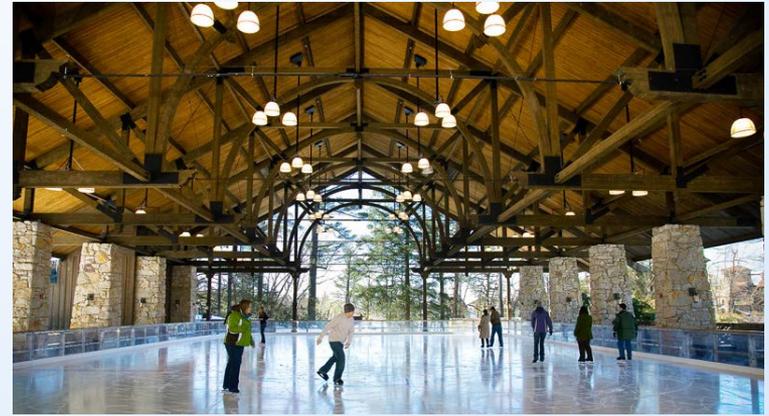
Ice Season: Mid Nov - Mar

Non-Ice Season: Apr – Mid Nov

City of New Paltz Population (2010): 14,003

County Population (2015): 180,143

The Ice Pavilion is a private venue owned and operated by the Mohonk Mountain House Hotel. Although the venue is private, much of the operations, uses, and structure is similar to the pavilion proposed in Goshen. The rink is 120 feet by 60 feet and hosts curling, broomball, birthday parties, and other skating events in the winter months. During the summer months, the pavilion holds corporate events, weddings, lobster bakes, and other events.



Mohonk Mountain House Ice Pavilion

New Paltz, New York

HSP reached out to Mohonk Mountain House Ice Pavilion management to better understand the facility and its operations. Key takeaways from that conversation included the following:

- Not allowing hockey and regular leagues keeps the ice and pavilion in better conditions. When individuals or teams are visiting regularly, they begin to take ownership and treat the facility with less respect.
- The Pavilion makes the majority of their money from private parties and corporate events. A 90-minute private party for 50 people costs \$550. Corporate groups pay \$800 for a 60-minute session.
- Some sort of food and beverage, whether that be a small kitchen or concessions, is critical to the success of the venue.
- When marking the ice, using paper or vinyl can save between \$1100 and \$3000 in clean-up
- Some of the things the rink would change include more storage, better lighting (such as LED), and food service separate from skate rental
- Recycling some of the hot air given off by cooling the ice can be used to help heat the rest of the facility and support buildings
- Zambonis used for cleaning the ice give off carbon monoxide – installing fans in the roof of the pavilion helps to clear this out and decreases humidity on warmer winter days

Chapter 5

Site Plan / Cost

Site Master Plan

HSP engaged Sink Combs Dethlefs to prepare a site master plan, preliminary rendering, and event diagrams for the proposed Project. The figure to the right shows the site master plan for the pavilion.

The rendering displayed features a full-sized rink (100' x 206') rotated on the north side of the project site with an adjacent 5,400-square foot support building. This configurations allows the pavilion to be nestled into the park. A paved plaza and event lawn space are to the south of the rink, adjacent to the Millrace Trail. While extensive parking is shown, the area is proposed to now just include six ADA parking stalls and a drop-off area. The site master plan also includes an area for future bermed lawn seating and amphitheater stage south of the Project.



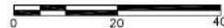
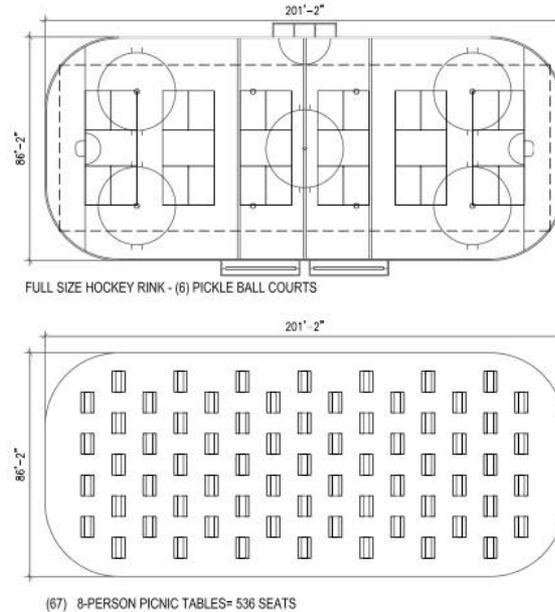
**SINK
COMBS
DETHLEFS**
ARCHITECTURE DESIGN

MILLRACE PAVILION
Goshen, Indiana
August 2017

Site Master Plan

Event Diagrams

Event Diagrams: The figure to the right, prepared by Sink Combs Dethlefs, shows the alternate event diagrams for the full-size hockey rink. The proposed Project will be able to accommodate six pickle ball courts and 67 8-person picnic tables, totaling 536 seats.



MILLRACE PAVILION
Goshen, Indiana
August 2017

Alternate Event Diagrams

Multipurpose Programming Examples

The figure to the right shows multipurpose programming examples from comparable projects throughout the region. This includes festivals, public events, picnics, and roller blading.



Urschel Pavilion, Valparaiso



Urschel Pavilion, Valparaiso



Headwaters Park, Ft. Wayne



Millenium Park, Chicago



Chiddister Pavilion, Goshen



MILLRACE PAVILION
Goshen, Indiana
August 2017

Multi-purpose Programming Examples

Rendering

The figure to the right, prepared by Sink Combs Dethlefs, shows a preliminary rendering of 'Millrace Pavilion' from a plaza perspective.



MILLRACE PAVILION
Goshen, Indiana
August 2017

Plaza Perspective

Cost Estimate

Goshen Pavilion - Opinion of Probable Cost

Item	Estimated Cost	Notes
Architecture & Engineering Fees	\$324,001	7% of construction
Developer and Financing Costs	\$0	N/A
Direct Construction Costs	\$4,628,591	8 months of general conditions, 5% contractor fee
Environmental Remediation	\$0	Site has been remediated at top 2' of soil
Furnishing and Equipments	\$446,000	Allowance
Legal	\$0	By City inhouse counsel
Permitting	\$0	Waived by City
Subtotal Estimated Project Costs	\$5,398,592	
Other	\$269,930	5% - owner contingency % of project cost
Total Estimated Project Cost	\$5,668,522	

Source: Sink Combs Dethlefs

The table to the right, prepared by Sink Combs Dethlefs, shows a high level cost estimate for the proposed Project. This estimate assumes the design and construction of a multi-purpose pavilion with a commercial grade ice system, a 5,400-square foot support building, 6 ADA parking stalls, and additional site development costs. The FF&E allowance list for the project includes the ice resurfacers (\$100,000), dasher boards, netting, and goals (\$125,000), skate rental equipment (\$50,000), tables and chairs (\$73,000) and additional site accessories (\$60,000). Sink Combs Dethlefs estimates a total Project cost of \$5.7 million.

Chapter 6

Governance

Overview

The governance and operational structure of the facility will be critical to the success of the Pavilion in Goshen. In order to attract the impactful events, tournaments, and entertainment that the community aims to host, the proposed project will have to marketed aggressively and proactively. Such a unique venue, especially with an ice component, will require a certain level of technical skill and experience in order to operate efficiently. Once the facility is attracting events, providing a well-operated and structured experience to the visitors is critical to ensuring repeat business moving forward. There are a variety of operational structures that can be utilized for the proposed project. Those are described below:

- **Park & Recreation Department Management:** As described in the case studies section of this chapter, the majority of these types of complexes throughout the country are operated by the local parks and recreation department.
- **Third Party Management:** Subcontracting a third part management company is also option. The business model is to be paid a management fee with specific incentives built in to drive incremental revenue streams like sponsorships. Staffing for the facility and event management services may or may not be included in those fees.
- **Creation of New Hybrid Model:** This would mean the creation of a public/private partnership model (non-profit), that would allow for government to continue to pay the anticipated operational loss of the facility, but allow the local non-profit to be entrepreneurial in business style, solicit and accept donations from the private sector, but due to the local makeup of the board, it would be sensitive to local constituency issues.
- **Other Models:** This would include a long-term lease of the property to a third party owner/operator who would invest the construction capital, operate the facility, provide both local and tournament programming services. Another model would include public management and subcontracting out certain activities or operations to private vendors/operators.

Chapter 7

Demand and Financial Projections

Demand Projections

The table below shows HSP's demand projections, by event type, for the proposed Project in years one through ten of operations.

Goshen Pavilion - Demand Projections										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Hockey Tournaments	1	1	2	2	2	2	2	2	2	2
Classes	4	4	5	5	5	5	5	5	5	5
Private Ice Rentals (# of hours)	50	50	55	60	65	65	65	65	65	65
Other Sporting Events/Tournaments (Non-Ice)	4	4	4	4	5	5	5	5	5	5
Concerts	3	3	3	3	4	4	4	4	4	4
Public Events and Festivals	20	20	20	20	22	22	22	22	22	22
Social Events	16	16	16	16	20	20	20	20	20	20
Hourly Rentals (Non-Ice, # of hours)	200	220	240	260	260	260	260	260	260	260
Total # of Events (not including rental hours)	48	48	50	50	58	58	58	58	58	58
# of Rental Hours	250	270	295	320	325	325	325	325	325	325

Source: Hunden Partners

HSP projects approximately 48 total events in Year 1, increasing to 58 annual events by stabilization. This includes 22 public events and festivals, as well as 20 social events (weddings/banquets/family reunions) and 260 hourly rentals. By stabilization, HSP project 325 total hours of facility rentals.

Attendance Projections

The table below shows HSP's attendance projections, by event type, for the proposed Project in years one through ten of operations.

Goshen Pavilion - Attendance Projections										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Hockey Tournaments	400	400	800	800	800	800	800	800	800	800
Classes	96	120	130	150	150	150	150	150	150	330
Open Skating - Hourly	14,663	15,300	15,938	17,213	18,488	18,488	18,488	18,488	18,488	18,488
Open Skating - Season Pass	1,913	1,913	1,913	1,913	1,913	1,913	1,913	1,913	1,913	1,913
Private Ice Rentals (# of hours)	1,500	1,500	1,650	1,800	1,950	1,950	1,950	1,950	1,950	1,950
Other Sporting Events/Tournaments (Non-Ice)	1,000	1,000	1,000	1,000	1,250	1,250	1,250	1,250	1,250	1,250
Concerts	900	900	900	900	1,200	1,200	1,200	1,200	1,200	1,200
Public Events and Festivals	7,000	7,000	7,000	7,000	7,700	7,700	7,700	7,700	7,700	7,700
Social Events	3,200	3,200	3,200	3,200	4,000	4,000	4,000	4,000	4,000	4,000
Hourly Rentals (Non-Ice, # of hours)	6,000	6,600	7,200	7,800	7,800	7,800	7,800	7,800	7,800	7,800
Total	36,671	37,933	39,730	41,775	45,250	45,250	45,250	45,250	45,250	45,430

Source: Hunden Partners

HSP projects an annual attendance of approximately 37,000 in Year 1, increasing to more than 45,000 by stabilization. This includes approximately 18,500 open skates per year by stabilization, and 7,700 attendees for public events.

Financial Projections

HSP projects a \$72,000 operating deficit in Year 1, decreasing each year until reaching \$12,000 Year 6. HSP projects that open skating, followed by facility rentals, will be the primary revenue generators for the complex. Salaries and wages assume one full time employees in the summer and two full-time employees in the winter, as well up to 20 part-time employees.

Goshen Pavilion - Pro Forma (000s)										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Operating Revenues										
Space Rentals	\$62	\$66	\$71	\$77	\$88	\$90	\$92	\$94	\$97	\$99
Hockey Tournaments (Net)	6	6	13	14	14	14	15	15	15	16
Leagues and Classes (Net)	4	5	6	7	8	8	8	8	9	9
Open Skating	97	101	107	116	124	146	146	146	146	146
Advertising/Sponsorships	21	22	22	23	23	24	24	25	26	26
Food and Beverage	11	11	12	13	15	15	16	16	16	17
Total Operating Revenues	\$201	\$211	\$232	\$249	\$271	\$297	\$301	\$305	\$309	\$313
Operating Expenses										
Salaries, Wages, and Benefits (Full-Time)	\$152	\$156	\$160	\$164	\$168	\$172	\$177	\$181	\$186	\$190
General and Administrative	32	32	33	34	35	36	37	37	38	39
Utilities	68	70	72	74	75	77	79	81	83	85
Repairs & Maintenance	0	0	0	0	0	0	0	0	0	0
Insurance	16	16	17	17	17	18	18	19	19	20
Advertising	5	5	6	6	6	6	6	6	6	7
Total Operating Expenses	\$273	\$280	\$287	\$294	\$302	\$309	\$317	\$325	\$333	\$341
Net Operating Income (Loss)	(\$72)	(\$69)	(\$55)	(\$45)	(\$30)	(\$12)	(\$16)	(\$20)	(\$24)	(\$28)

Source: Hunden Partners

Chapter 8

Economic, Employment, and Fiscal Impact Analysis

Economic, Fiscal, and Employment Impact

HSP projects that the annual direct and indirect spending as a result of the complex to exceed \$481,000. The development of the complex will support 10 full-time equivalent jobs in the community as a result of the total spending and generate \$264,000 per year in earnings. HSP projects that the Pavilion will generate 1,035 room nights per year and \$25,000 in fiscal impact annually, assuming a seven percent sales tax and 12 percent occupancy tax (7 percent state and 5 percent Goshen).

Summary of Annual Operating and One-Time Construction Impacts

Operations

Total Spending - Direct and Indirect	\$481,000
Total Jobs (Full-Time Equivalent)	10
Total Earnings	\$264,000
Room Nights	1,035
Total New Tax Revenues	\$25,000

Construction

Labor Expenditures	\$1,158,000
Sales of Materials and Services	\$2,468,000
Employment	21

Source: Hunden Partners

THANK YOU