

AGENDA

1. Introductions
2. Purpose of Meeting
3. Feasibility Study
4. Market Analysis - Number of Ice Pads
5. Existing Site - Retrofit Versus New
6. Site Location Analysis
7. Cost Estimates
8. Discussion and Feedback



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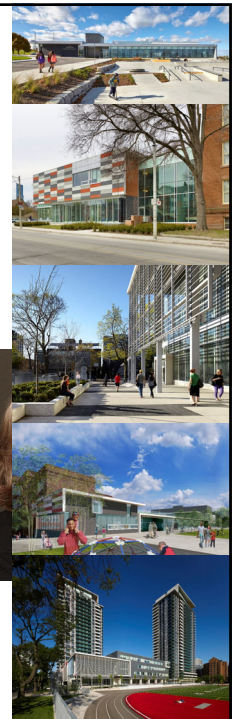
INTRODUCTIONS



Susan Lewin, Managing Principal
 B ARCH, MUD, OAA, FRAIC, LEED BD+C, ND, CPHD

- **Managing Principal**
- **Experience in Recreational Public Sector Work**
- **Net Zero Expertise, CPHD**
- **Urban Design Expertise, MUD**
- **Worked with City**

- Davisville Aquatic Centre Net Zero Emissions
- Regent Park Community Centre
- Mount Dennis Net Zero Energy Childcare
- Birchmount Community Centre
- Victoria Road Recreation Centre
- Balmoral Recreation Centre, Brampton
- Burnhamthorpe Community Centre, Mississauga
- Three City Recreational Facilities Feasibility Study
- Aurora Family Leisure Complex
- Harbourfront Community Centre and Child Care, Waterfront Public School
- North Toronto Collegiate Redevelopment/Republic
- Richmond Green Sports Complex
- University of Waterloo SLC, Physical Activities Complex



INTRODUCTIONS



- **Project Architect**
- **Experience in Recreational Public Sector Work**
- **Day to Day Administration**
- **Worked with the City**

Ryan Giuricich, Project Architect
B ARCH, OAA,

- Davisville Aquatic Centre Net Zero Emissions
- Balmoral Recreation centre
- Burnhamthorpe Community Centre
- Victoria Road Recreation Centre
- 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

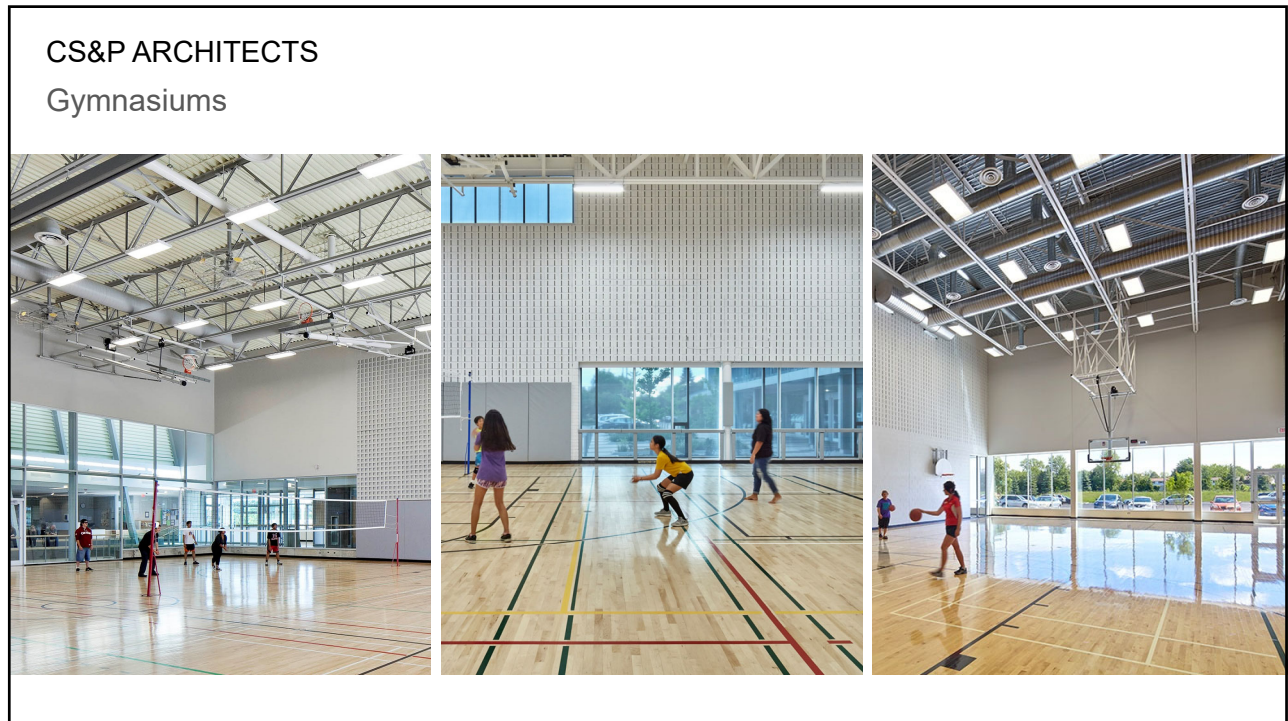


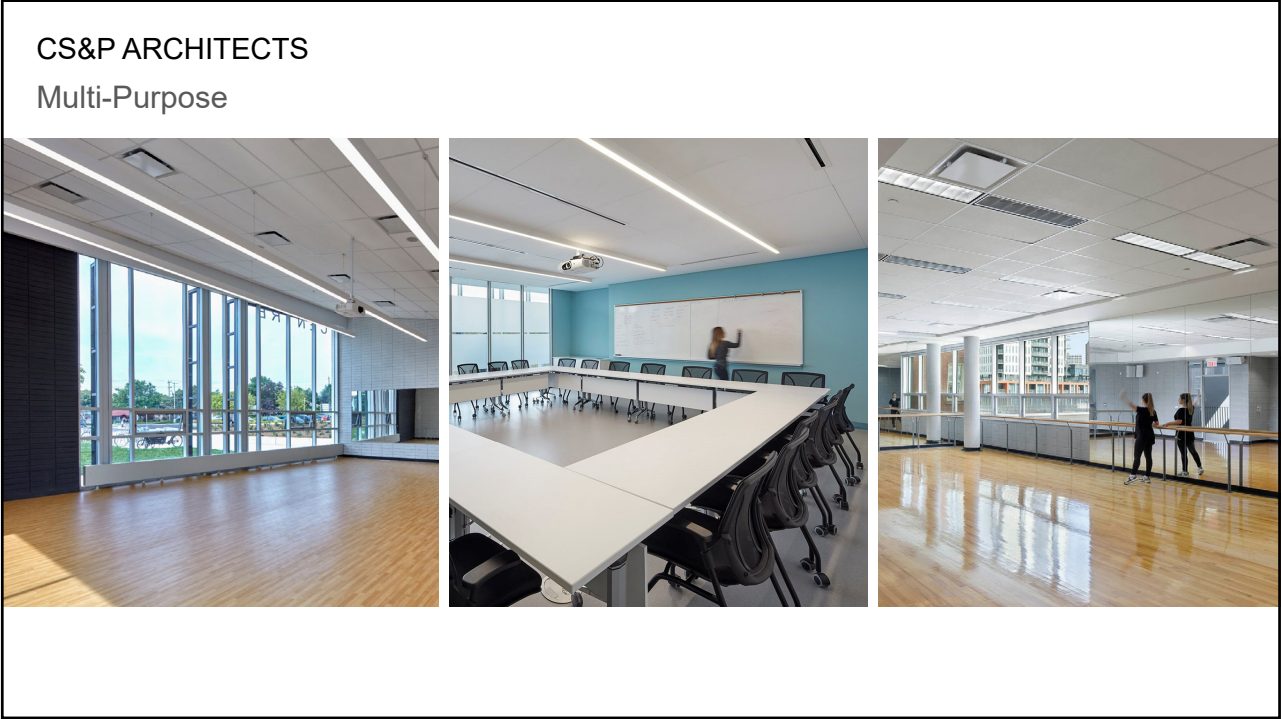
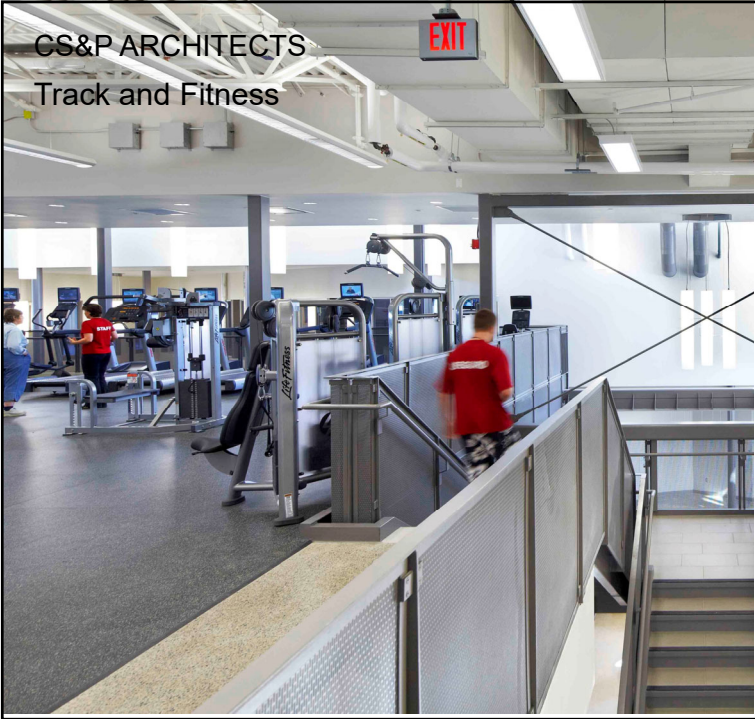
CS&P ARCHITECTS

Recreation

- Lawrence Heights Community Centre NZB
- Davisville Aquatic Centre NZB
- Balmoral Recreation Centre
- Burnhamthorpe Community Centre
- Wayne Gretzky Sports Complex
- Gravenhurst Centennial Centre
- Victoria Road Recreation Centre
- Regent Park Community Centre
- Lancers Sports and Recreation Centre
- Aurora Family Leisure Complex
- 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
- West End YMCA/Brampton YMCA







PURPOSE OF MEETING

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

- Number of Ice Pads
- Retrofit Versus New
- Location

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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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FEASIBILITY STUDY

Public Consultation Schedule

September 25 - Public Meeting 1 – Information gathering, Arena Advisory Committee Feedback

September 9 - 23 Online Survey - provided additional public input- 92 responses

[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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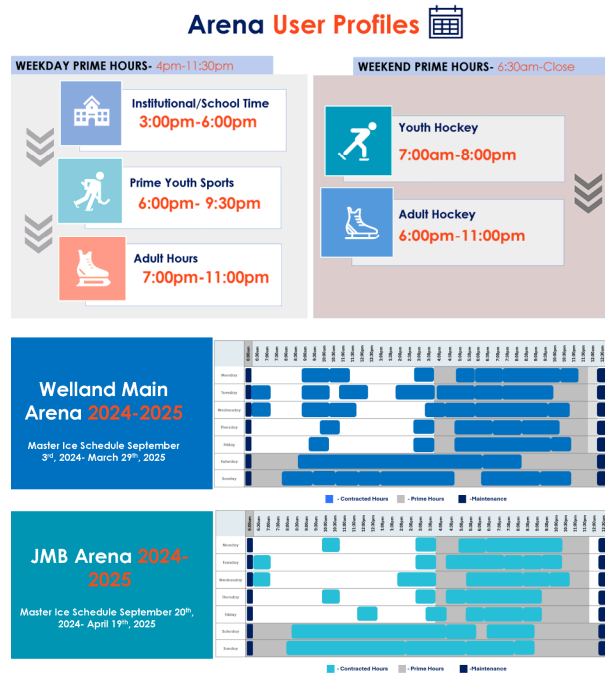


MARKET ANALYSIS – NUMBER OF ICE PADS

MARKET ANALYSIS

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

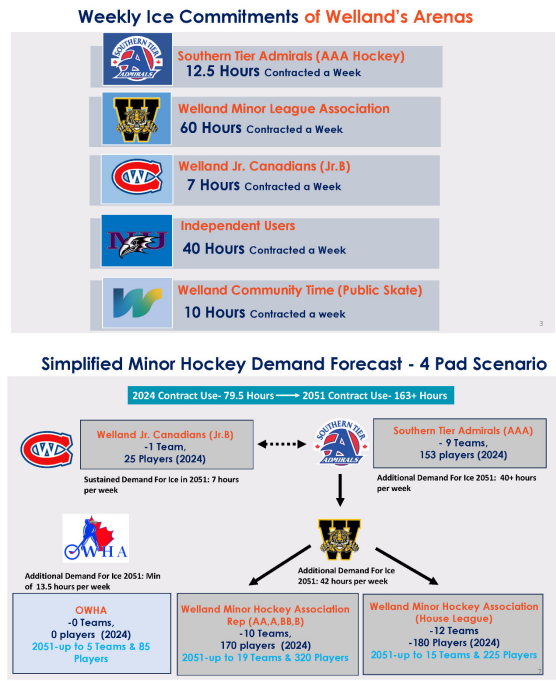
- Prime time ice is presently constrained, with the core hours are almost entirely covered. There is little opportunity to generate additional revenue.
- Demand indicators are showing that there is a shortage of ice facilities in Welland.
- As a combined facility, Welland arenas are running at 75% contract utilization of prime time for hockey.
- Other organizations are leaving the market to use facilities in multiple other locations.



MARKET ANALYSIS

Future Opportunities

- 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
- Presently missing in the market is local OWHA (women's), Figure Skating/Canskate, Ringette, Sledge Hockey, Men's and Women's leagues (over 30,00 members), and Private Instruction/Skills development.
- Since the City of Welland only has 2 pads, usually Welland has to hire outside arenas for any tournaments.

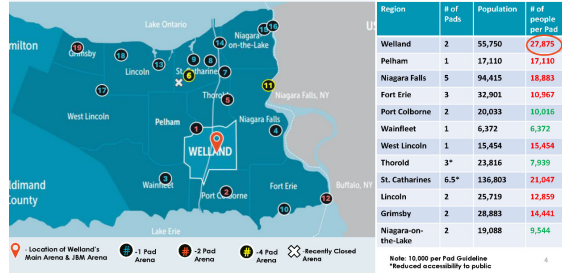


MARKET ANALYSIS

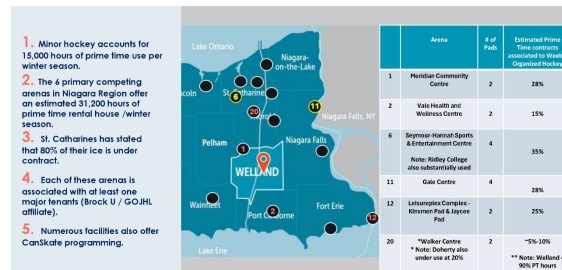
Regional usage data & regional design

- 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 contract.
- New facilities are becoming multi faceted facilities with other uses-gyms, fitness etc.

Map of Indoor Arenas in the Niagara Region in relation to Welland Main Arena & Jack Ballantyne Memorial Arena



Top Arena Competitors and Contracted Prime Time Hours - DRAFT



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. The number is almost double the population.
- Population growth will likely eventually double the size of Welland, this 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

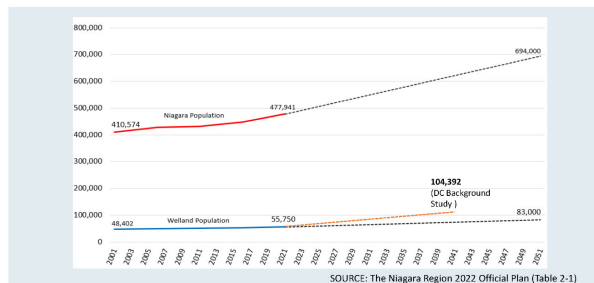


Table ES-2: Residential Population, Employment Population & Dwelling Unit Growth (2022-2041)

City Wide	10-Year Development Charges Study Period (2022-2031)	Beyond 10 Years (2032-2041)	Total to Build Out (2022-2041)	
Residential Population ¹	25,094	23,547	48,642	87%
Employment Population	3,587	3,587	7,173	13%
Total Residential & Employment Growth	28,681	27,134	55,815	100%
Dwelling Units	11,805	10,615	22,420	
Non-Residential Gross Floor Area (GFA) (s.f.)	2,431,593	2,431,593	4,863,186	

¹Includes Census undercount

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.
- **Future demands are tracking towards the need for 4 pads for Welland. Therefore the Feasibility Study recommendation is to provide a 4 pad facility design.**

SITE LOCATION

TEST FITS – 5 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 nearby
- Other community benefits

Location and Accessibility

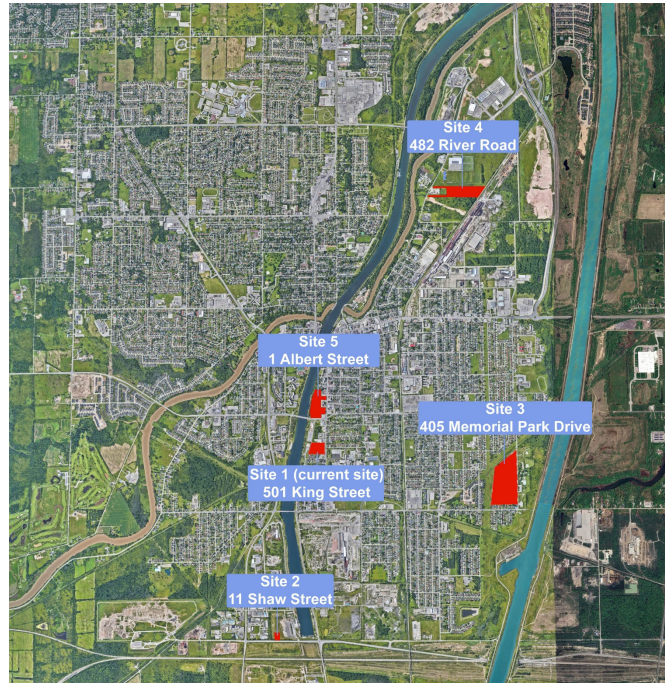
- Convenience for users/visitors
- Transportation impacts

Construction Impacts

- Shut down and other impacts

Environmental Impacts

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



SITE 1 - 501 KING STREET



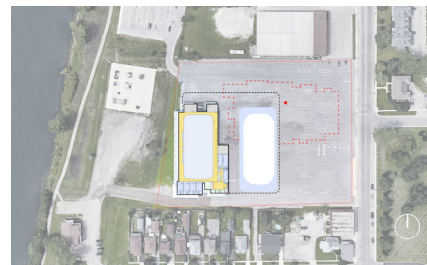
SITE 1 - 501 KING STREET



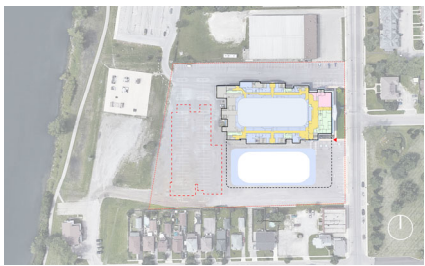
TEST FIT- EXISTING SITE 1



Option 1- Retrofit only



Option 3- Keep Jack Ballantyne Arena



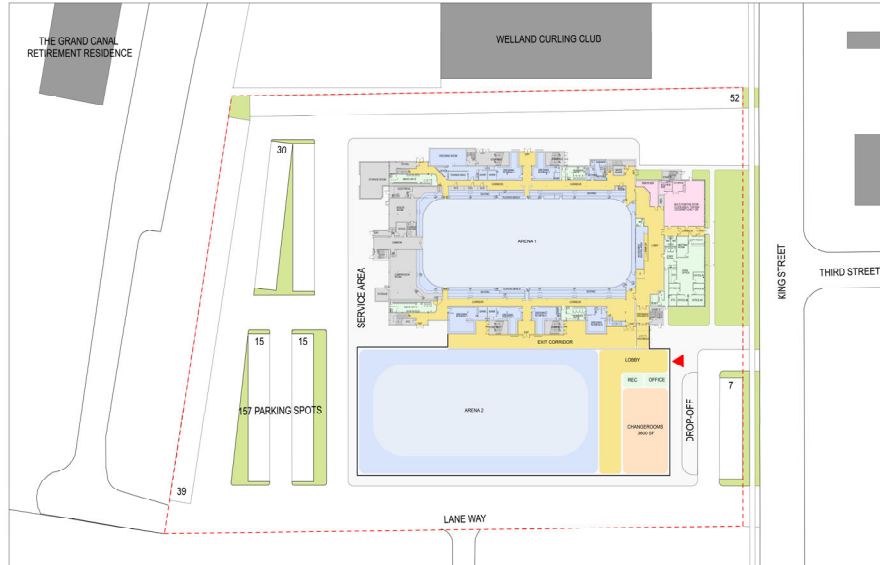
Option 2- Keep Main Arena



Option 4- New Build

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

- Option 2:
Demolish JBYA,
Keep Main Arena
Create Twin Pad:
\$50M



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

- Option 4:
Demolish
Existing, New
Twin Pad \$80M



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

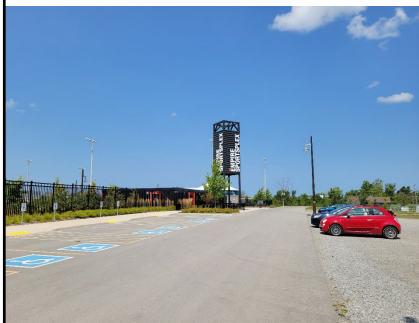
Option 3 - Keep Jack Ballantyne Arena, create twin pad

- 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

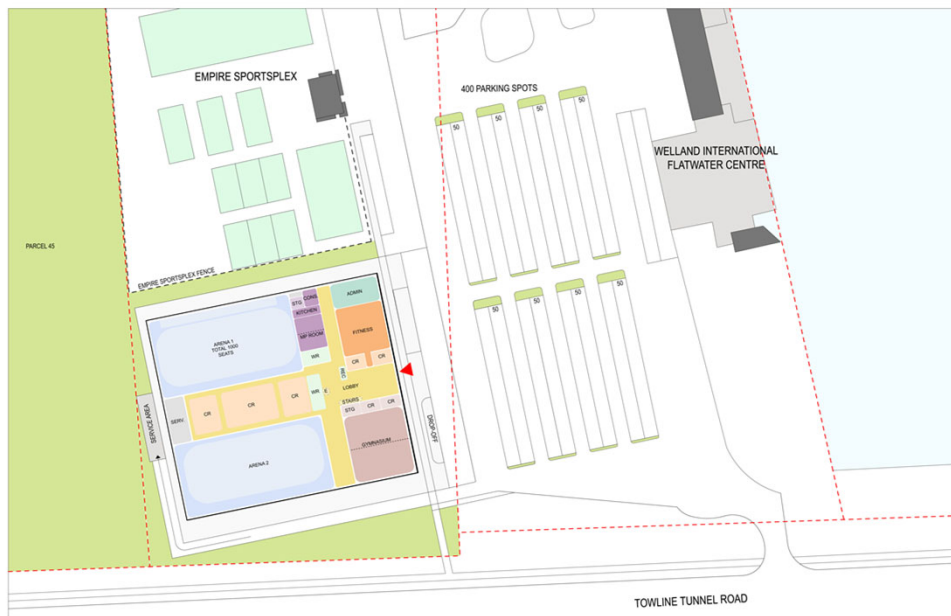
SITE 2 - SHAW STREET



SITE 2 - SHAW STREET



SITE 2 - SHAW STREET – TEST FIT



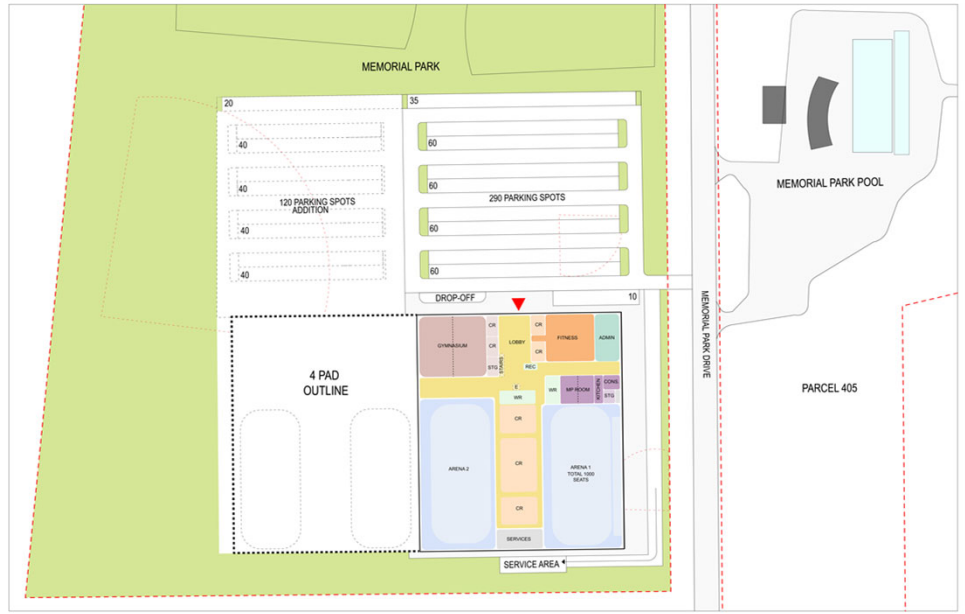
SITE 3 - 405 MEMORIAL PARK DRIVE



SITE 3 - 405 MEMORIAL PARK DRIVE



SITE 3 - 405 MEMORIAL PARK DRIVE TEST FIT



SITE 4 - 482 RIVER ROAD

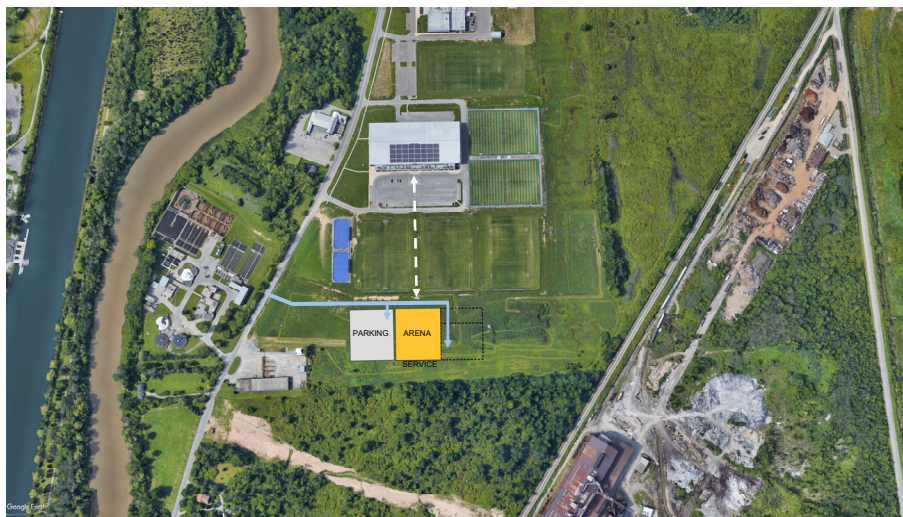
- 12.6 acres, owned by the city
- Adjacent to Youngs Sportsplex, also owned by City
- Potential for expanded sports and recreation campus



SITE 4 - 482 RIVER ROAD



SITE 4 - 482 RIVER ROAD - TEST FIT 2



SITE 4 - 482 RIVER ROAD – TEST FIT 1



SITE 5 – 1 ALBERT STREET

- xx acres, owned by the city



SITE 5 – 1 ALBERT STREET



SITE 5 – 1 ALBERT STREET



SITE 5 – 1 ALBERT STREET



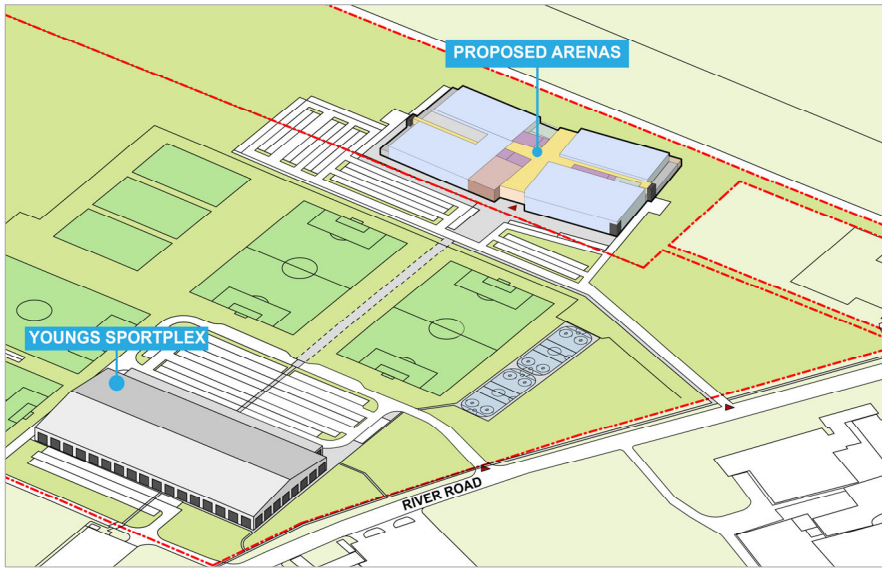
SITES ANALYSIS MATRIX

- 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 1 601 King Street	Property 2 45 Shaw Street	Property 3 406 Memorial Drive	Property 4 482 River Road	Property 5 1 Albert Street
30% Site Size	4.65 acres	4.72 acres	32.4 acres	12.6 acres	8 acres
Fits a 2 pad	Yes	Yes	Yes	Yes	No
Fits a 4 pad, and multi-use program	No	No	Yes	Yes	No
Can accommodate up to 350 parking spaces	No	No	Yes	Yes	No
Can accommodate outdoor recreation uses	No	No	Yes	Yes	No
Score	10%	10%	30%	30%	10%
20% Site Synergies					
Has complementary recreational uses nearby	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, lacrosse, Sport Campus	Welland Community Centre, multi-purpose, therapy pool, billiards, fitness, theatre, seniors
Has other community amenities nearby, and community benefits	Restaurant next door, Hospital across street. Revitalization can contribute to Community Improvement Plan and Revitalizing Downtown	No other amenities, close to industrial sites	No other amenities, residential single family home neighbourhood	Has hotels, shopping malls nearby, visitor convenience	Closer to downtown amenities than other options. Revitalization can contribute to Community Improvement Plan and Revitalizing Downtown
Score	15%	15%	15%	20%	15%
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	Highway 406 is 1.5 Km away. Woodlawn Road is 4 lanes and 5 Km away, very convenient for out of town users	On the border of downtown, not convenient for out of town users. Inadequate parking exists
Transportation Impacts	On bus route. Possible for some local users to walk or bicycle, continuous sidewalks both sides of street.	No Bus route. Off Townline Tunnel Road, which has a paved shoulder, no sidewalks	On bus route. Discontinuous sidewalks on narrow street. Few development may overload existing road	On bus route. Some existing sidewalks at Youngs Sportsplex. Recommend extending existing sidewalk south.	On bus route. Possible for some local users to walk or bicycle, continuous sidewalks both sides of street.
Score	12%	10%	15%	18%	12%
15% Construction Impacts					
Major impact, no ice facility available in Welland for 18 months or so during any construction scenario	Major impact, no ice facility 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	No impact. Greenfield site. As it is presumed previously undisturbed. Archaeological Stage 1 report required	No impact. Greenfield site.
Score	5%	10%	11%	14%	15%
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	Net Zero Emissions Facility Possible
Renewable energy potential	No solar PV potential, sloped roofs. Existing low-efficiency refrigeration plants	Solar PV potential on large rooftops	Solar PV potential on large rooftops	Solar PV potential on large rooftops	Solar PV potential on large rooftops
Score	0%	15%	15%	15%	15%
100% Total Score	42%	60%	88%	97%	52%

HIGHEST RANKING SITE - CONTEXT

- 2 pad with 4 pad expansion, multi-purpose sports centre
- 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

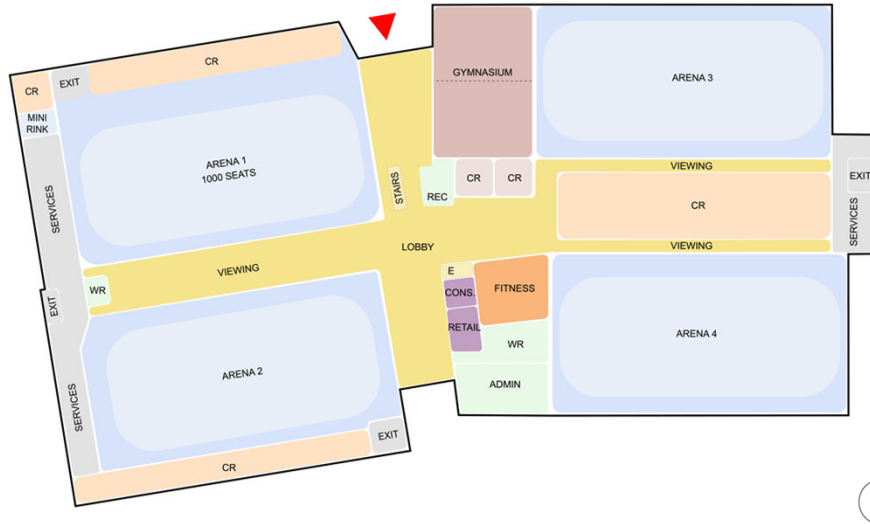


HIGHEST RANKING SITE - SITE PLAN



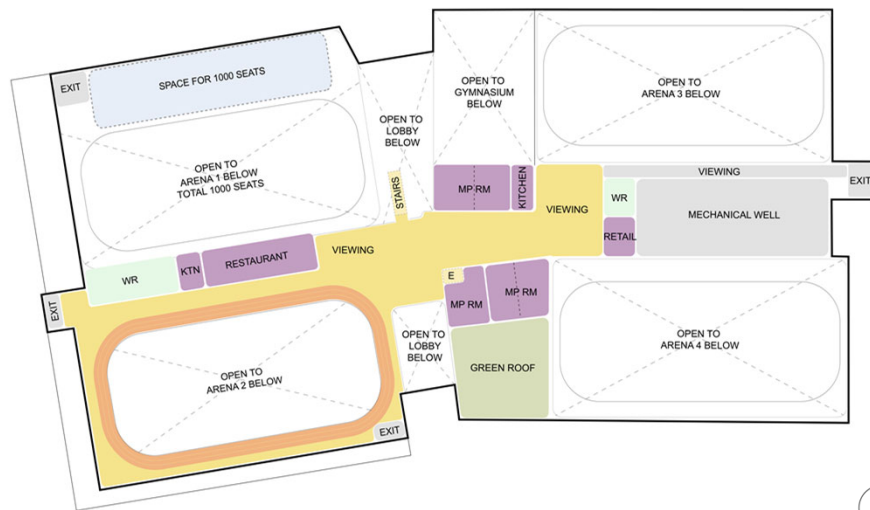
HIGHEST RANKING SITE - GROUND FLOOR

- '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



COST ESTIMATE

Cost Estimate

- Phase 1- 2 pad: \$82M
- Phase 2- 2 pad: \$55M
- Total PH 1 and PH 2= \$137M
- 4 Pad no phasing: \$121M

Project Cost Estimate

	PHASE 1 2 PAD	PHASE 2 ADDITION	TOTAL 1+2	NO PHASING 4 PAD
A Building Items				
Building Summary	\$48,793,416	\$26,372,958	\$75,166,374	\$73,931,546
Site Works	\$5,459,309	\$1,116,916	\$6,576,225	\$6,580,307
Sub-Total A	\$54,252,725	\$27,489,874	\$81,742,599	\$80,511,853
B Contractor General Conditions & Fee at 12.5%	\$6,781,591	\$3,436,234	\$10,217,825	\$10,063,982
Winter Heat and Protection at 0.5%	\$272,264	\$137,449	\$409,713	\$402,559
Sub-Total B	\$7,053,855	\$3,573,683	\$10,627,538	\$10,466,541
Total Construction Cost (A+B)	\$61,306,580	\$31,063,557	\$92,370,137	\$90,978,394
Design Contingency at 20%	\$12,261,116	\$6,212,711	\$18,473,827	\$18,195,679
C Total Construction Cost	\$73,567,696	\$37,276,268	\$110,843,964	\$109,174,073
Escalation for Phase 2 - 5 years at 6%	\$73,567,696	\$50,695,724	\$124,263,420	NA
D Soft Cost Allowance				
Furniture, Fitting, and Equipment Allowance at 7.5%	\$5,517,577	\$2,795,720	\$8,313,297	\$8,188,055
Professional Consulting Fees including Specialty Consultants	\$2,840,120	\$1,500,000	\$4,340,120	\$4,340,120
Internal CoW/Project Management Fees	NA	NA	NA	NA
2025 Permit Fees (\$24.55/sqm Additions +\$7.42/sqm Alterations)	\$75,000	\$75,000	\$150,000	\$75,000
Inspection and Testing Allowance	\$50,000	\$50,000	\$100,000	\$100,000
Other Contingencies	\$50,000	\$50,000	\$100,000	\$100,000
Total Soft Costs F	\$8,532,697	\$4,470,720	\$13,003,417	\$12,803,175
Total Project Costs E+F	\$82,100,393	\$55,166,445	\$137,266,838	\$121,977,248
E Soft Costs as a Percentage of Construction Cost	12%	12%	12%	12%

Notes:
 HST is not included
 6% is recommended for escalation per year.
 Cost are noted in today's dollars, with the exception as noted of the phased approach

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.