Canby Community Center
Market Assessment & Feasibility Analysis

Final Report:

Prepared for:

City of Canby and

Canby Parks & Recreation District

Prepared by:

Community Planning Workshop

Community Service Center

1209 University of Oregon

Eugene, OR 97403-1209

Email: cpw@uoregon.edu

cpw.uoregon.edu

July 2010

EXECUTIVE SUMMARY

Canby has invested considerable effort in working to best meet the parks and recreational needs of the Canby community. This is reflected in a range of planning efforts—including the Canby Parks Master Plan—which articulates a vision for parks and recreation in the community. There is growing public interest in having a community center and sports field complex. Several groups have an interest in the delivery of these services in the community including: the City of Canby, the Canby School District, the YMCA, the Canby Area Park and Recreation District (CAPRD), and Canby Kids. These organizations represent key stakeholder groups of the community center and provided consider guidance throughout this study.

As proposed, the Community Center will be a 50,000 square foot multi-purpose facility. The cost of developing the Community Center is estimated at approximately $13.8 million to $16.3 million. The Community Center would be capable of supporting a diverse range of athletic pursuits including swimming, basketball, volleyball, aerobics, weight and strength training, and many others. The facility will also have multi-use rooms, lockers, and showers. In addition to athletics, the proposed facility will be able to support cultural events, conferences and meetings.

Recognizing the need for detailed market information, the City of Canby contracted the University of Oregon's Community Planning Workshop (CPW) to conduct a market analysis and preliminary feasibility assessment for the proposed Community Center and sports fields. This report presents the results of CPW's analysis and conclusions with respect to the feasibility of the proposed community center.

FACILITY CONCEPT

Through an extensive planning and public involvement process, CPW developed a set of guiding principles with the intent of shaping the future concept to best fit the need of the Canby community. Some of the key principles that shaped the Canby facility concept are:

- **Accessibility –** The future center should be available to all members of the community regardless of age, gender, or physical ability.
- **Affordability –** The cost of using the center should be low enough to ensure access by all members of the community.
- **Safety –** The facilities should be equipped with all necessary safety equipment, and staff should work to ensure a safe recreational environment.
- **Program Diversity –** Activities and programs should cover a broad spectrum of the community's interests.
- **Energy Efficiency –** The building itself should be designed to use less resources for lighting, heating, and cooling.
- **Siting –** Determining whether the community center and sports field complex should be located on the same site influences the overall facility concept.

These principles were then used to develop facility priorities. Major components of the Community Center were identified through an initial scoping process conducted in late 2008 (see Table 1).

Results from the Canby Community Survey suggest that the scoping process was accurate in gauging what residents' desire in a community center. The survey results suggest a desire of respondents for a year-round community pool and related aquatic activities. Multi-purpose rooms and indoor athletic activities ranked the second and third most important facility components. This implies that respondents have a preference for general use spaces and facilities that would allow a variety of activities as opposed to more specialized courts and facilities.

Vision for the Canby Area Community Center

The Canby Community Center is a full service recreational center planned to serve residents living within the CAPRD district as well as provide a resource to residents of Clackamas County. Currently, these communities in great need of aquatic facilities and fitness facilities. The Canby Community Center will meet these needs as well as become a strong center for the Canby area.

The center will be an open and inviting building accessible to all. Natural lighting will contribute to the warmth of all spaces. The facilities will include an aquatics center with pool and therapy spa, a gymnasium, a weight and fitness room, indoor track, multi-purpose room, locker rooms, and family changing rooms. The indoor facilities will be integrated with outdoor playing fields. Ample parking and a drop off area will be provided for the center. Offices and a reception area will be centrally located for the staff to easily support all areas of the facility.

Table 1. Summary of Desired Features and Design Elements

Features	Desired Design Elements	Approx. Sq. Ft.
Indoor Pool Complex	leisure pool, slide, play features, spa, 9-foot depth, 6-lane lap pool, fixed poolside seating, family locker rooms	10,600 - 21,150
Gymnasium with Track	2 courts with divider, multi-use court, climbing wall, fixed seating, running/jogging track above gym	11,000 - 13,500
Fitness/Cardio Area	5,000 s.f. minimum, cardio/strength training machines, free weights, stretching/core training equipment	5,050 - 7,500
Group Exercise Rooms	cushioned hardwood floor, well-lit, well-ventilated, mirrored walls, dance bars, sound system	5,050 - 7,500
Multi-purpose Rooms	large room with dividers, kitchen, senior lounge,teen area, childcare/preschool, party rooms	3,400 - 6,500

Source: Canby Community Center Workshop Minutes, 2008; CPW comparables analysis (sq. ft. estimates), 2009

FINDINGS: MARKET ANALYSIS

In this section we summarize the key findings of our market analysis of the proposed Canby community center. Following is a summary of key findings from our research:

Facility Emphasis

The stakeholders initially identified the facility as youth and family-oriented. The survey and demographic data reinforce that objective. However, survey results also suggest that respondents desire a broad range of activities that engage people of all ages.

The survey data indicate that the aquatic center is the most important component of the facility. This is not surprising, the market area has limited aquatic facilities that are available to the general public, and the primary facility, Canby Swim Center, is scheduled to close within two years.

In addition, survey respondents indicated a strong preference for the facility to include non-athletic activities and spaces. Multi-purpose space was ranked the second most important component of the facility.

Target Audiences

Several demographic trends are relevant to the proposed facility. First, population has grown and is expected to continue to grow over the next ten to twenty years. Other things being equal, increased population equates to a larger base market and increased facility use.

Table 2 presents population data for Clackamas County, Canby, and the Canby School District. The primary market area for the community center is the Canby School District. While population figures for the district will not be updated until the 2010 Census, we believe the market area will grow at about the same rate as the county in the next five years—around 2.0 percent annually

Table 2. Population Trends and Projections
Clackamas County, Canby, Canby School District

Population	Canby School District	Canby	Clackamas County
2008	N/A	15,165	376,660
2000 Census	27,431	12,910	340,000
1990 Census	23,309	8,990	278,850
AAGR 1990-2000	1.64%	3.69%	2.00%
AAGR 2000-2008	N/A	1.62%	1.03%

Source: Forecasts of Oregon's County Populations and Components of Change, 2000-2040 Office of Economic Analysis, DAS

Analysis of Canby's age structure shows a large increase in the population of residents aged 50 years and older over the past two decades. At the county level, this segment of the population is expected to increase rapidly in the next ten years; we anticipate Canby will experience similar trends. As Canby's population continues to age, it will be important to offer programs that are accessible to all activity levels.

The population of youth in the Canby School District has grown at a steady rate in past years. The population of youth aged 10 – 17 years has increased approximately 20% between 1990 and 2000. We expect updated 2010 Census data will confirm that this trend has continued in recent years. A growing youth population has implications for program offerings as well as demand.

Income level should also be considered when designing a facility to be accessible to all. Our research indicates that Canby has a higher percentage of low income residents compared to Clackamas County. Developing a fee structure that allows access for low-income members of the community will ensure that price is not a barrier for some.

Employment data we reviewed indicate that employment in the area is expected to continue to increase. In general, employment increases are accompanied by corresponding population increases.

Sports Participation Trends

The survey results indicate that sports participation patterns in the market area are generally similar to statewide patterns. Many of the activities proposed at the community center are moderate-growth activities, and many are also high-participation activities both in terms of the number of participants and the frequency of participation.

Emerging exercise activities like Yoga and Tai Chi appear to be popular in the Canby area. These programs are beneficial to the design programs because they can attract a steady flow of users—and program fees—yet do not require activity-specific capital expenditures.

Additionally, activities that have seen steady growth like weightlifting, aerobic exercise, and exercising with equipment are compatible with the facility concept. Each of these activities experienced significant growth at the national level since 2006 (3% - 6%). High participation activities are also compatible with the proposed facility concept. Activities like exercising with equipment, swimming, and working out at a club draw approximately 1 million Oregonians annually.

Competing/Comparable Facilities in the Local Market

CPW's inventory of local facilities found only limited facilities available for community use in the market area. Most of these facilities were privately-owned and cater to specific market segments. Moreover, no facilities contained the variety of activities the proposed Community Center could host.

The lack of comparable local facilities supports the need for the proposed community center. The lack of facilities suggests that a community center that accommodates a range of uses would address unmet community needs and would attract substantial use.

CPW also conducted case studies of several community centers in the region[1]. This analysis of "comparable" facilities provided key insights into the design, programming, and financial performance of community centers in this region.

Several trends surfaced in our review of the comparable facilities. First, all of the facilities in similar sized markets included aquatic facilities, gymnasiums, and multi-purpose space. All of these components are a part of the proposed facility concept for the Canby Community Center.

Second, and perhaps more importantly, only one of the facilities experienced full cost recovery (Sherwood YMCA). In other words, it is common for similar facilities to not generate enough revenue to cover operating and maintenance costs. Cost recovery was generally 40 percent to 60 percent.

FINDINGS: PRELIMINARY FEASIBILITY ASSESSMENT

This section presents the findings of CPW's preliminary feasibility assessment—include estimated construction costs, fees, and financial performance.

Facility Cost

Based on facility costs of between $275 and $325 per square foot, a 50,000 square foot facility will cost between $13.8 million and $16.3 million to design and build (see Table 3). This assumes that CAPRD will identify an appropriate site with easy access to services. A smaller facility would cost less.

Table 3. Facility Cost Estimates[1]

Cost Category	Percent of Total Cost	Cost Per Square Foot		
		$ 275.00	$ 300.00	$ 325.00
Land Cost	n/a	n/a	n/a	n/a
Architectural & Engineering Cost	8%	$ 1,100,000	$ 1,200,000	$ 1,300,000
Building Cost	80%	$ 11,000,000	$ 12,000,000	$ 13,000,000
Other Cost	12%	$ 1,650,000	$ 1,800,000	$ 1,950,000
Total Cost	100%	$ 13,750,000	$ 15,000,000	$ 16,250,000

Source: CPW, 2009

[1] These estimates are based on the facility concept described in Chapter II.

Because the facility reviewed in this analysis is only at the conceptual stage, some change in the final construction cost estimate is inevitable. The final facility design should include much more detailed construction cost estimates. These more detailed cost estimates will include a line-item analysis for various facility components. This will result in a more refined cost estimate than the cost per square foot method we applied.

[1] Comparables facilities include: East Portland Community Center, Southwest Portland Community Center, Federal Way Community Center, Lincoln City Community Center, and the Sherwood YMCA.

Facility Use

The preliminary feasibility and cost recovery analysis is based, in part, on assumptions regarding facility use. The facility use estimates are shown in Table 4. We estimate that the proposed facility would receive between 90,000 and 180,000 visits annually during the first few years of operation.

Table 4. Facility Use Estimates – Summarized Visitation Estimates

	Scenario A	Scenario B	Scenario C
Estimated Use	**High Participation**	**Medium Participation**	**Low Participation**
Low	130,300	93,100	55,800
Medium	186,400	133,200	80,000
High	259,900	185,700	111,100

Source: CPW, 2009

Fee Structure and Revenue Estimates

Determining the appropriate fee structure is an important component of facility management. Fees are influenced by market forces, the supply of competing facilities, and a number of other factors. Moreover, fees follow basic principles of supply and demand and can influence use. A community center should have a fee structure that allows access for all members of the community, regardless of economic status. Thus, the key issue is how to keep the facility affordable while still recovering a significant percentage of operating and maintenance costs.

Table 5 shows the amount survey respondents are willing to pay per person per visit to use a local community center. Nearly 58 percent of the respondents indicated a range of between $1 and $10. The mean value respondents indicated they would spend was approximately $5.

Table 5. Amount Respondents are Willing to Pay Per Visit (Individual)

Amount Per Visit	Count	Percent
Less than $1	80	33%
$1.00 - $4.99	76	31%
$5.00 - $9.99	66	27%
$10 or more	24	10%

Source: Canby Community Center and Sports Field Complex Survey, CPW, 2009

While memberships and drop-in fees make up a large percentage of community center revenue, there are a number of other revenue sources that must be considered. These include program fees, concessions, facility rentals, and charges for amenities like towels and lockers. Based on our research of comparable facilities, we found that the average revenue generation per visit was approximately $5.50 and a range of $5.00 to $6.00.

Applying this average revenue per visit data to our visitation estimates yield a low gross revenue estimate of about $440,000 (based on about 80,000 visits), a medium estimate of about $740,000 (based on about 135,000 visits), and a high estimate of about $1,040,000 (based on about 190,000 visits).

Operating and Maintenance Costs

Table 6 shows average operating and maintenance (O & M) costs at comparable facilities.[2] O & M costs at comparable facilities averaged approximately $1.2 million annually. The highest category of operating and maintenance costs was personal services followed by utilities, which accounted for nearly 16% of total O & M costs.

Based on the average expense per visit of comparable facilities ($9.00), total O & M ranges from $730,000 (based on an approximately 80,000 visits) to $1.7 million (based on approximately 190,000 visits). Our average visitation estimate of 135,000 yields total O & M costs of $1.2 million and personal expenses of around $730,000.

Table 6. Average O & M Costs of Select Comparable Facilities

Category	Amount	Percent of Total
Personal Services	$ 735,610	60%
Supplies	$ 38,659	3%
Purchased Services	$ 71,139	6%
Marketing/Public Relations	$ 14,549	1%
Utilities	$ 201,731	16%
Capital Costs	$ 77,659	6%
Maintenance/Repairs	$ 65,068	5%
Other Expenses	$ 27,004	2%
Total Expenses	**$1,231,417**	**100%**

Source: CPW, 2009

Preliminary Financial Feasibility Assessment

Our preliminary feasibility assessment suggests the facility, as proposed, will not break even on operating and maintenance costs (this does not include construction or other capital costs such as land). Recognizing several uncertainties in this analysis, we developed three use scenarios reflection high, medium, and low estimates of facility use and revenues and expenses (see Table 7).

The three scenarios indicate O & M cost recoveries of between 45 percent and 86 percent. The annual revenue shortfall would be between $200,000 and $500,000. Revenues would range from $400,000 to $1.1 million, while expenditures would range from between $900,000 to $1.3 million.

The operating and maintenance costs and revenue estimates are based on the preliminary facility concept, survey results and other data evaluated in this report. Because we are not reviewing a specific facility on a specific site, the estimates should be considered preliminary.

[2] Certain facilities discussed in Appendix D: Comparables were omitted from this analysis due to insufficient budget data.

Table 7. Preliminary Feasibility and Cost Recovery Analysis

Category	Scenario C (Low Participation)	Scenario B (Medium Participation)	Scenario A (High Participation)
Inputs			
Visitation	80,000	135,000	190,000
Revenue Per Visit	$ 5.00	$ 5.50	$ 6.00
Cost Per Visit	$ 11.00	$ 9.00	$ 7.00
Revenues			
Member Fees	$ 161,954	$ 300,628	$ 461,570
Daily Admissions	$ 109,296	$ 202,880	$ 311,492
Other Activities/Programs	$ 91,583	$ 170,001	$ 261,011
Facility Rental	$ 6,660	$ 12,363	$ 18,982
Equipment Rental	$ 11,834	$ 21,967	$ 33,727
Concessions	$ 5,384	$ 9,995	$ 15,345
Other Revenue	$ 13,288	$ 24,667	$ 37,872
Total Revenues	**$ 400,000**	**$ 742,500**	**$ 1,140,000**
Expenses			
Personal Services	$ 525,684	$ 725,803	$ 794,500
Supplies	$ 27,627	$ 38,144	$ 41,754
Purchased Services	$ 50,837	$ 70,190	$ 76,834
Marketing/Public Relations	$ 10,397	$ 14,355	$ 15,714
Utilities	$ 144,161	$ 199,041	$ 217,880
Other Expenses	$ 121,293	$ 167,467	$ 183,318
Total Expenses	**$ 880,000**	**$ 1,215,000**	**$ 1,330,000**
Financial Indicators			
Profit (Loss)	(480,000)	(472,500)	(190,000)
Cost Recovery	45%	61%	86%

Source: CPW, 2009

Financial Risk Factors

As with any project of this scale, there is a great deal of risk with respect to construction, operation and maintenance. The results of our preliminary feasibility analysis suggest that costs are likely to exceed revenues by between 14 and 55 percent. This is typical for facilities such as the proposed community center.

Based on our research, we identified several areas that have potential financial risk. These are discussed in more detail below:

Facility Design and Construction Costs

Design the facility with functionality in mind. The building design has a significant impact on facility costs. Review of comparables suggests that construction costs for a 50,000 square foot facility for between $275 and $325 per square foot. The key issue is to strike a balance between cost, quality and amenity—that is supported by area residents.

Aquatic center costs account for the largest percentage of facility construction cost. Depending on features and upgrades, aquatic center cost varies. Based on comparable facilities and the preliminary design program, we anticipate the construction of the aquatic center to be between $6 and $7 million[3]. This equates to nearly half of the overall construction cost of the center, and is driven primarily by material costs and design.

Fee Structure

Fees follow basic rules of supply and demand. Selecting an appropriate fee structure will impact both use and revenues. Fees that are too high will tend to discourage facility use and facility revenues. Fees that are too low will reduce revenues and increase the amount of subsidy needed to break even. Fees should be structured to accommodate the broad range of expected users.

Facility Staffing

Our analysis indicates that personnel expenses are typically the largest single expense category for this type of facility. An overstaffed facility will lead to unnecessary costs. Conversely, an understaffed facility will be poorly maintained and supervised and may lack programs users consider essential and may discourage use. Analysis of comparable facilities showed that staff costs were not drastically influenced by attendance. While additional part-time and seasonal staff are required as attendance increases, our analysis shows that these positions are less costly relative to the fixed costs of administrative personnel.

Facility Maintenance

Survey respondents clearly indicated that a well-maintained and managed facility was essential to their use decisions. Thus, the facility should be kept clean and equipment should be maintained as needed.

RECOMMENDATIONS

The results of this study suggest that market demand in the Canby area can support a community center. Additionally, this facility may be financially feasible provided the community can identify revenue sources to cover anticipated shortfalls and the cost of construction. However, considerable work remains before a local community center can become a reality.

Based on our evaluation, CPW recommends a facility of approximately 50,000 square feet with the amenities described in the design program. We do not recommend phasing development of the facility—the relative additional costs of building the non-aquatic portions of the facility are not conducive to a phased development program. The survey results suggest strong support for both the aquatic and other elements of a community center.

Moreover, it complicates the process of financing the facility. If the region chooses to fund a portion of the facility with a bond measure, there is a possibility that a phased approach would result in failure of future project phases. In short, we recommend the stakeholders work to communicate

[3] The East Portland Community Center finished construction on their aquatic center in 2009 at a cost of $733/sq. ft.

how the full community center meets the broad range identified community needs—not just those of swimmers.

Following are some recommended next steps that the stakeholders should implement to assist in the completion of this project. Note that the recommendations do not reflect any specific priority or schedule.

- Develop a concise project plan and schedule.
- Conduct focus groups with potential users to further refine facility design priorities.
- Using the conceptual design program, create a conceptual rendering of the floor plan, exterior, and site plan of the facility.
- Initiate fundraising for design and engineering as soon as possible.
- Prepare a request for proposals (RFP) for the design and engineering of the facility.
- Consider hiring a fundraising professional.
- Establish a fundraising committee comprised of a broad cross-section of the local community.
- Identify a preferred site (or sites) for the facility.
- Develop a mechanism to cover operating and maintenance costs
- Use the survey results to develop preliminary programming for the facility.
- Continue working with a broad coalition of local groups.
- Design and site the facility in a manner that allows phased expansion.

Table of Contents

Executive Summary i

Facility Concept i

Vision for the Canby Area Community Center ii

Findings: Market Analysis iii

Facility Emphasis iii

Target Audiences iii

Sports Participation Trends iv

Competing/Comparable Facilities in the Local Market iv

Findings: Preliminary Feasibility Assessment v

Facility Cost v

Facility Use vi

Fee Structure and Revenue Estimates vi

Operating and Maintenance Costs vii

Preliminary Financial Feasibility Assessment vii

Financial Risk Factors viii

Recommendations ix

Chapter I: Introduction 1

Purpose 1

Methods 2

Limitations of this study 4

Organization of this report 4

Chapter II: Facility Concept & Description 5

Facility Concept 5

Community Center Design Guidelines 6

Proposed Community Center Amenities 7

Preliminary Facility Design Program 9

Vision for the Canby Area Community Center 9

Preliminary Design Program 9

Summary 12

Chapter III: Market Area and Demand 13

Market Area Definition 13
Demographic characteristics of the market area 15
Population 15
Employment 18
Income 19
Sports participation trends 20
Key Findings 25
Implications 25
Chapter 4: Local facility inventory 26
Local facilities 26
Regional facility inventory 26
Characteristics of local and regional facilities 27
Current use of local facilities 29
Proposed facilities in the market area 30
Operational characteristics of comparable facilities 30
Size 30
Building Costs 31
Visitation 31
Amenities 32
Operating Costs 32
Revenue 32
Staffing 33
Key Findings 33
Implications 34
Chapter 5: Preliminary Feasibility Analysis 35
Construction Cost Estimates 35
Facility use estimates 36
Scenario A (High Participation) 36
Scenario B (Medium Participation) 36
Scenario C (Low Participation) 37
Revenue Estimates 41
Operating and Maintenance Costs 42

Preliminary Feasibility and Cost Recovery 44
Financial Risk Factors 45
Facility Design and Construction Costs 46
Fee Structures 46
Facility Staffing 46
Facility Maintenance 46
Summary 46
Chapter 6: Conclusions and Recommendations 47
Summary of key findings 47
Facility Emphasis 47
Target Populations 47
Market Trends 48
Local Inventory 48
Performance of Comparable Facilities 48
Preliminary Financial Analysis 48
Recommendations 49
Appendix A: Demographic and Socioeconomic Indicators 51
Population 51
Employment 54
Income 56
Education 57
Appendix B: Sports Participation Trends 59
Methods 59
Sports Participation Trends 59
Exercise Walking 61
Swimming 61
Running and Jogging 62
Soccer 62
Basketball 63
Aerobics Exercising 63
Exercise with Equipment 63
Weight Lifting 64

Volleyball 64
Football 65
Baseball 65
Yoga 65
Softball 66
Implications 66
Individual Activities 66
Team Sports 67
Appendix C: Results of the CAPRD Household Survey 69
Methods 69
Respondent Characteristics 70
Survey Findings 73
Current Sports Participation 73
Current Facility Use 79
Summary of Comments 80
Desired Community Center Characteristics 81
Aquatic Activities 81
Multi-Purpose Facilities 82
Indoor Athletic Activities 82
Support Space/Facilities 83
Special Courts/ Facilities 83
Future Community Center Use 85
Desired Sports Field Characteristics 90
Summary of Comments 90
Future Sports Field Use 91
Facility Siting and Function 93
Implications 94
Transcript of Written Comments 103
Appendix D: Review of Comparable Facilities 108
Methods 108
East Portland Community Center, Portland, OR 109
Federal Way Community Center, Federal Way, WA 110

Lincoln City Community Center, Lincoln City, OR 111
Sherwood YMCA, Sherwood, OR 112
Southwest Portland Community Center, Portland, OR 113
Appendix E. Fee Schedules 114
Lincoln City Community Center – Lincoln City, Oregon 114
Southwest Portland Community Center – Portland, Oregon 117
East Portland Community Center – Portland, Oregon 119
Federal Way Community Center – Federal Way, Washington 121
Sherwood YMCA – Sherwood, Oregon 122

CHAPTER I: INTRODUCTION

Canby has invested considerable effort in working to best meet the parks and recreational needs of the Canby community. This is reflected in a range of planning efforts—including the Canby Parks Master Plan—which articulates a vision for parks and recreation in the community. There is growing public interest in having a community center and sports field complex. Several groups have an interest in the delivery of these services in the community including: the City of Canby, the Canby School District, the YMCA, the Canby Area Park and Recreation District (CAPRD), and Canby Kids. These organizations represent key stakeholder groups of the community center and provided consider guidance throughout this study.

This study explores the feasibility of a multi-use community center and sports fields in the Canby area. The facility concept is for an approximately 50,000 square foot multi-purpose Community Center. The cost of developing the Community Center is estimated at approximately $13.8 million to $16.3 million.[4]

As a multi-purpose facility, the Community Center would be capable of supporting a diverse range of athletic pursuits including swimming, basketball, volleyball, aerobics, weight and strength training, and many others. The facility will also have multi-use rooms, lockers, and showers. In addition to athletics, the proposed facility will be able to support cultural events, conferences and meetings (a more detailed description of the proposed facility concept is presented in Chapter II).

The facilities would primarily serve households that live within the Canby Area Park and Recreation District (CAPRD), although they would be available to anyone. The major user groups of the facilities will include local residents, youth sports organizations, and the Canby School District.

Recognizing the need for detailed market information, the City of Canby contracted the University of Oregon's Community Planning Workshop (CPW) to conduct a market analysis and preliminary feasibility assessment for the proposed Community Center. This report presents the results of CPW's analysis and conclusions with respect to the feasibility of the facility and design elements that will help attract users.

PURPOSE

The purpose of this report is to assess demand for the proposed community center, to identify local competing facilities, and to conduct a preliminary market and financial feasibility assessment of the facility. Specifically, this report:

- Presents a conceptual design program for the community center;
- Evaluates demand for a multiple use community center;
- Evaluates the supply of competing facilities in the market area;
- Identify facility characteristics that would attract users; and
- Presents a preliminary feasibility assessment of the proposed facilities.

[4] This report does not evaluate specific sites; a key issue facing the community is whether to co-locate the community center with a potential sports field complex.

METHODS

Market and feasibility analyses must consider both *demand* factors and *supply* factors that affect the proposed facilities. CPW designed a work program that focuses on these relationships and gathers information on desired characteristics of the facilities. To analyze the market for the proposed community center and sports field complex, CPW gathered a variety of data. Specifically, we analyzed:

- **Demand Indicators**. To examine demand indicators for the proposed facilities, CPW analyzed key socioeconomic trends, surveyed potential users, and assessed sports and recreation patterns in the Canby community.

  Our review of socioeconomic trends is based on data from the U.S. Census, the Oregon Employment Department, the Bureau of Economic Analysis, and demographic questions from the CPW-administered household survey. This information helped us to describe and analyze population, income, and employment trends in Oregon and the CAPRD market area. We also analyzed trends in the Portland Metropolitan Region and the Canby area. These trends are important indicators of potential future demand for the proposed multiple use sports facility.

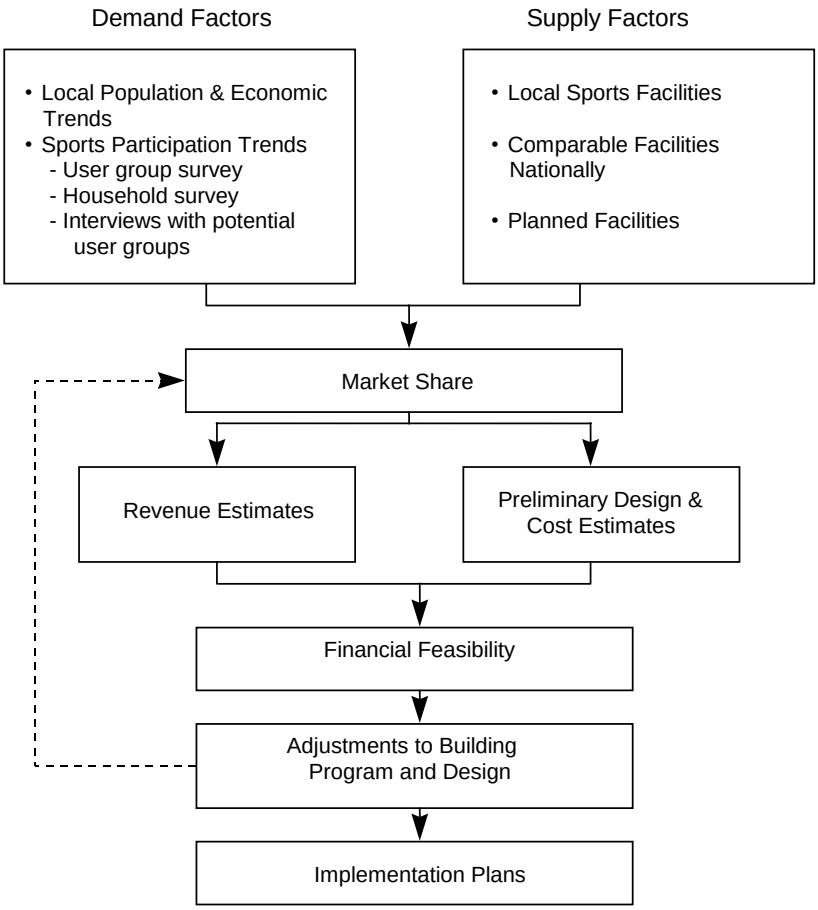
  We also reviewed data on sports participation patterns as described by the national Sporting Goods Associations *Annual Sports Participation Survey*. Data from this survey can be found in Appendix B. To better understand sports participation patterns at the local level, we also distributed a survey by mail to 1,500 randomly selected households in the CAPRD District boundary. The survey was designed to collect detailed information on sports participation, desired amenities, potential use of the proposed facilities, and demographic information. Complete results from this survey can be found in Appendix C.
- **Inventory of Local Sports Facilities**. CPW conducted an inventory of sports facilities in the Canby area as one component of our supply analysis. CPW researched existing and planned facilities using online resources and telephone interviews.
- **Analysis of Comparable Facilities**. CPW identified five facilities in Oregon and Washington that were comparable to the proposed facilities. The purpose of this analysis was to gather information on use, facility configurations, and financial characteristics of facilities like the proposed facility. The analysis of comparable facilities is examined in more detail in Appendix D.
- **Evaluation of Key Amenities**. Based on data from the review of comparable facilities and household surveys, we identified a mix of characteristics that are important to the success of the proposed community recreation facilities. This analysis is primarily intended to assist in refining a facility design that meets the needs and desires of the Canby community.

Finally, we conducted a preliminary feasibility analysis. Our feasibility assessment is based on the facility *as proposed*. We present construction, operating, and maintenance cost estimates as well as revenue forecasts. The feasibility assessment presents an *operations break-even* analysis. Conversations with the local officials indicate that capital costs will be generated from other sources.

Figure 1 shows a conceptual diagram of our research methodology. It is important to note the relationship between supply and demand factors in determining market share that the proposed

facilities would capture. Additionally, market analyses typically provide information that can be incorporated into the building design that can potentially impact market share.

Figure 1
Market Analysis



LIMITATIONS OF THIS STUDY

The analysis presented in this study represents market and financial modeling based on the performance of similar facilities. That modeling required CPW to make assumptions to forecast use, revenues, and expenses. One key assumption concerns future economic conditions: we assume that local and regional economic conditions will remain approximately the same as they are at this time—we do not attempt to determine how a major recession or other significant economic change would influence use. Another involves marketing and management of the facility: we assume that the facility will be operated similar to other organizations we interviewed. If marketing efforts are not effective, or fees increase dramatically beyond what comparable facilities charge, our forecasts are likely to be too high.

For similar reasons, we must qualify our cost and revenue estimates. Because most revenues depend on the amount of use, any assumption that affects use also affects revenues. Despite these limitations, inherent in any forecast, we believe that the precision of our estimates is appropriate for the purposes for which they were intended: to develop a recommendation on the feasibility of the community center and sports field complex as proposed and to help define and evaluate preliminary design options.

ORGANIZATION OF THIS REPORT

This report can be read on several levels. Readers who want a brief overview of the study's findings, conclusions, and recommendations should read the Executive Summary or Chapter 6. The body of the report is organized to address specific market-related issues and data. Finally, readers who desire detailed data should turn to the appendices.

This report is organized into six chapters (including Chapter 1) and several appendices.

Chapter 2, Facility Concept and Description gives a detailed explanation of the proposed complex's location, structure, facilities, and amenities.

Chapter 3, Market Area and Demand describes demographics, including population, employment, and income; national, state and local sports participation trends; and results of the user group and household surveys.

Chapter 4, Supply Analysis presents an inventory of local sports facilities specifically focusing on basketball, volleyball and multiple use facilities. The inventory includes both public and private facilities. We also describe the results of a survey of comparable facilities in this chapter.

Chapter 5, Preliminary Feasibility Analysis presents a preliminary analysis of the financial aspects of the proposed recreational facilities. We describe construction costs, operating costs and revenues, and estimate the level of use needed for the facilities to break-even on operating costs.

Chapter 6, Conclusions and Recommendations provides an overview of the implications of the data reviewed in this study.

The appendices present detailed demand, supply, and financial data. Appendix A presents market area demographic data. Appendix B presents sports participation data. Appendix C presents the household survey results. Appendix D presents the comparable facilities. Appendix E contains fee structures for comparable facilities, and Appendix F presents detailed construction costs.

CHAPTER II: FACILITY CONCEPT & DESCRIPTION

This chapter presents an overview of the proposed community center, including guiding principles, desired amenities, and square footage ranges for key elements of a community center. In short, it presents a facility concept based on local desires and review of comparable facilities. Thus, it is intended to provide the reader with a local perspective on the proposed community center and desired amenities, as well as recommendations from comparable facilities.

FACILITY CONCEPT

The primary purpose of a community center is to offer programs and resources that enhance the social, cultural, and physical well-being of those living within its service area. Additionally, a community center serves as a tool for community development and can assist in bringing together individuals from diverse backgrounds and age groups. It is with this general concept in mind that the Canby community has identified a need for a community center.

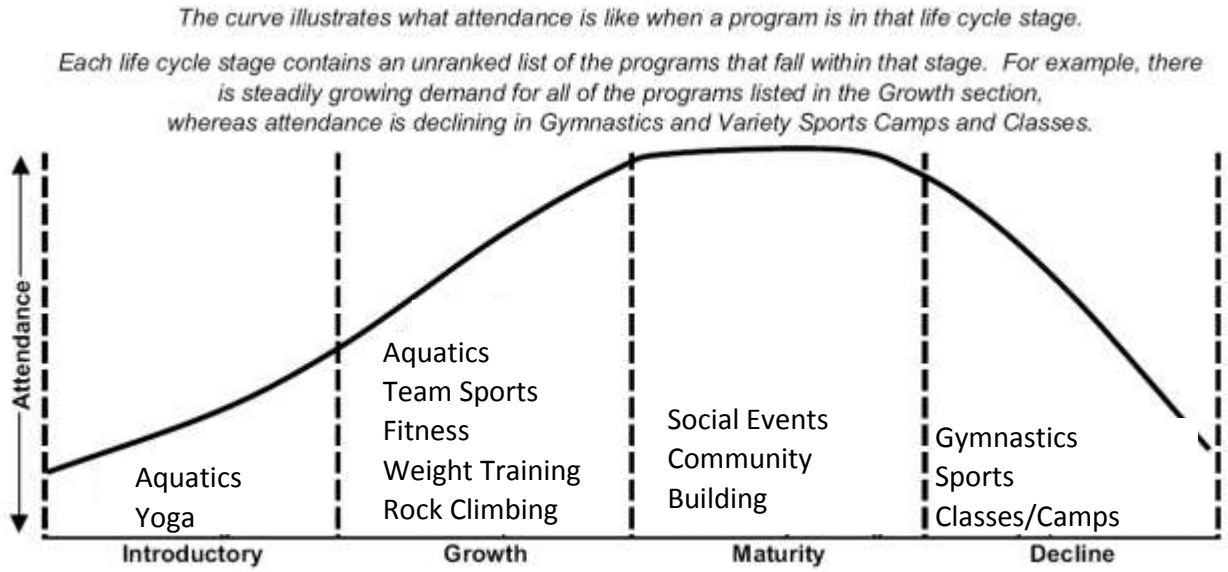
Through an extensive planning and public involvement process, CPW developed a set of guiding principles with the intent of shaping the future concept to best fit the need of the Canby community. Some of the key principles that shaped the Canby facility concept are:

- **Accessibility –** The future center should be available to all members of the community regardless of age, gender, or physical ability.
- **Affordability –** The cost of using the center should be low enough to ensure access by all members of the community.
- **Safety –** The facilities should be equipped with all necessary safety equipment, and staff should work to ensure a safe recreational environment.
- **Program Diversity –** Activities and programs should cover a broad spectrum of the community's interests.
- **Energy Efficiency –** The building itself should be designed to use less resources for lighting, heating, and cooling.
- **Siting –** Determining whether the community center and sports field complex should be located on the same site influences the overall facility concept.

The community vision is to construct and operate a community center and sports fields that provide a range of amenities and programs to meet identified community needs. It is important to note, however, that as the proposed community center grows and matures, it is necessary for the programs and activities to change as well.

Figure 2-1 illustrates a typical community center life cycle. As the diagram shows, attendance typically climbs during the Introductory and Growth stages until it plateaus at the Maturity stage. The duration of each stage varies for each community center, although because the proposed Canby center will be unique to the area, CPW expects it to have a brief Introductory stage followed by several years of steady growth in attendance.

Figure 2-1. Life Cycle of a Community Center



Source: Southwest Portland Community Center Business Plan, 2009 (adapted from original)

COMMUNITY CENTER DESIGN GUIDELINES

Portland Parks and Recreation partnered with SERA Architects to develop a set of Room Design Guidelines for Community Centers. While some of the figures are out of date for the actual use of community centers, the document provides some useful guidelines which can be used in developing the Canby Community Center.

- Open, inviting, and approachable to all citizens
- Open design concept – clear visuals throughout center for orientation and security
- Clear organization for control and security
- Durable, low maintenance materials that can hold up to heavy use
- Abundant natural light
- Showcase internal activities to the surrounding community
- Visual relief from exercise areas (view)
- Energy conservation and recycled building materials (sustainability)
- Multiple-use space over dedicated, single-use spaces
- Create a social center (second living room) for the users. Foster social interaction, not isolation.
- Create a landmark that embodies the “sense of place” for the neighborhood (reinforces context).

Other guidelines that are listed in the document include separating community spaces and active spaces to control for fees, noise, and odors. Also, the control desk should be central to both of these elements so that staff can watch the entrances to both facilities. They recommend that child care and educational facilities should be close to the staff at the control desk for safety reasons. The

aquatics office should also be located where it can overlook the natatorium for safety purposes as well.

PROPOSED COMMUNITY CENTER AMENITIES

CPW identified the proposed community center amenities through series of public meetings, a household survey, and research of amenities offered by comparable facilities. Table 2-1 highlights the most important features that came out of this process and the design elements that were important to the Canby community.

Table 2-1. Summary of Desired Features and Design Elements

Features	Desired Design Elements
Indoor Pool Complex	leisure pool, slide, play features, spa, 9-foot depth, 6-lane lap pool, fixed poolside seating, family locker rooms
Gymnasium with Track	2 courts with divider, multi-use court, climbing wall, fixed seating, running/jogging track above gym
Fitness/Cardio Area	5,000 s.f. minimum, cardio/strength training machines, free weights, stretching/core training equipment
Group Exercise Rooms	cushioned hardwood floor, well-lit, well-ventilated, mirrored walls, dance bars, sound system
Multi-purpose Rooms	large room with dividers, kitchen, senior lounge,teen area, childcare/preschool, party rooms

Source: Canby Community Center Workshop Minutes, 2008

This process also identified a number of preferences for building materials and general design characteristics, shown in Table 2-2:

Table 2-2. Summary of Desired Building Materials and General Design Elements

Building Materials	Design Elements
CMU block walls	Natural lighting with many windows
Stained and/or stamped concrete	Dropped ceilings
Bamboo floors/dividers	Low maintenance landscaping
No tile in locker rooms	Welcoming entry area
No bright white paint	Refreshment area

Source: Canby Community Center Workshop Minutes, 2008

In an effort to prioritize the demand for design elements and facilities, Canby residents were asked to rank the importance of several community center components as part of the CPW household survey. This process helps to determine what the community feels is a mandatory amenity as opposed to an optional amenity. The results of the survey reveal the following priorities:

- **Priority #1 –** Year-round indoor aquatic center
- **Priority #2 –** Multi-purpose activity center
- **Priority #3 –** Indoor athletic activities
- **Priority #4 –** Support space and facilities
- **Priority #5 –** Special courts and facilities

These results suggest a strong desire of respondents for a year-round community pool and related aquatic activities. Multi-purpose rooms and indoor athletic activities ranked the second and third most important facility components. Because of the strong demand for these types of activities, we can consider their inclusion in the community center as mandatory. Establishing a variety of indoor athletic activities can be further guided by sports participation information that was collected in the mailed survey. A summary of popular sports and activities is shown in Table 2-3.

Table 2-3 – Sports/Activities participated in during the last 12 months by survey respondents

Activities	Number	Percent
Walking	188	76.4%
Biking	114	46.3%
Strength and flexibility	103	41.9%
Running/Jogging	99	40.2%
Treadmill/Stair machine	91	37.0%
Weight training	91	37.0%
Bowling	82	33.3%
Arts & Crafts	74	30.1%
Golf	73	29.7%
Aquatics	67	27.2%
Aerobics	64	26.0%
Basketball	61	24.8%
Soccer	59	24.0%
After school programs	57	23.2%
Performing Arts	56	22.8%
Dance	51	20.7%
Swimming (laps)	48	19.5%
Yoga/Tai Chi	48	19.5%

Source: Canby Community Center and Sports Field Complex Survey, CPW, 2009

Popular activities like exercise walking, bicycling, strength training, and running/jogging can all be accommodated with the inclusion of a cardio facility with exercise equipment. It is important to note that approximately 20% of respondents indicated that they took part in both dance and yoga for recreation and exercise in the past year. These activities should be closely considered in order to develop a variety of programs that appeal to the residents of Canby.

Evaluating changes in sports participation trends will be important to responding to the changing preferences of the community and will help guide program offerings. It is also important to choose programs that are appropriate to the life cycle of the center. As Figure 2-1 suggests, it is important to offer emerging sports and activities during the introductory stage of a community center in order

to generate excitement and increase attendance. Using this model, activities like yoga could be used to attract visitors and increase the use of the center.

PRELIMINARY FACILITY DESIGN PROGRAM

The facility design program presented in this section is conceptual and preliminary in nature. It is not a detailed, construction level program; rather it is intended to provide guidance to the community as well as being flexible to respond to changes that might occur as the community evaluates appropriate sites. The final design will depend on the specific site selected, the project's budget, and several other factors that cannot be assessed at this early stage of the planning process.

Vision for the Canby Area Community Center

The Canby Community Center is a full service recreational center planned to serve residents living within the CAPRD district as well as provide a resource to residents of Clackamas County. Currently, these communities in great need of aquatic facilities and fitness facilities. The Canby Community Center will meet these needs as well as become a strong center for the Canby area.

The center will be an open and inviting building accessible to all. Natural lighting will contribute to the warmth of all spaces. The facilities will include an aquatics center with pool and therapy spa, a gymnasium, a weight and fitness room, indoor track, multi-purpose room, locker rooms, and family changing rooms. The indoor facilities will be integrated with outdoor playing fields. Ample parking and a drop off area will be provided for the center. Offices and a reception area will be centrally located for the staff to easily support all areas of the facility.

Preliminary Design Program

Based on survey results and review of comparable facilities, the local market can support a facility of approximately 50,000 square feet. To gain a better perspective on how space is allocated in such facilities, we reviewed the building configurations of comparable facilities. Tables 2-4 through 2-8 outline the five important sections of the community center and give an area range for each element of that section. These ranges should be used to give a general idea of the size of other facilities and not used as exact guidelines.

Table 2-4 shows building support space, including reception areas, locker rooms, and storage. Lobbies in comparable facilities are rather large to welcome visitors and accommodate for heavy traffic times. While locker room space is important, family changing rooms are becoming increasingly important. Some facilities have up to six family changing rooms to allow families with small children to have less worry about bringing children of the opposite gender into the locker room with them.

Table 2-4. Building Support Space, Area Range

	Square Feet
Reception	300 - 600
Lobby	1,000 - 1,500
Locker Rooms	2,500 - 3,500
Family Changing Rooms	400 - 800
Custodial Storage	200 - 500
Total	**4,400 - 6,900**

Source: CPW, 2009

Table 2-5 shows administration space, including offices, break rooms, and supply rooms. The office size will depend on the size of the staff at the new facility, and a larger staff or different office requirements could necessitate more space than is allocated here.

Table 2-5. Administration Space, Area Range

	Square Feet
Offices	500 - 1,000
Staff Break Room	200 - 300
Supply Room	200 - 400
Total	**900 - 1,700**

Source: CPW, 2009

Table 2-6 shows the activity space for comparable facilities. Most facilities allocated between 2,000 and 4,000 square feet for exercise/workout space and community/meeting space. Through interviews with facility directors, CPW found that space allocations for fitness and exercise areas were often insufficient, suggesting that a larger amount of space should be allocated to these rooms. In a preliminary scoping meeting facilitated by CPW, a YMCA representative recommended that the fitness area be a minimum of 5,000 square feet.

Table 2-6. Activity Space, Area Range

	Square Feet
Fitness Area	3,200 - 5,000
Fitness Area Storage	100 - 150
Wood Floor Exercise Room	1,500 - 2,000
Exercise Room Storage	250 - 350
Total	**5,050 - 7,500**

Source: CPW, 2009

Table 2-7 shows the community space for comparable facilities. Gymnasium facilities account for about 20-25 percent of floor space. Most facilities reviewed had gymnasium space close to 10,000 square feet, which was also noted as insufficient.

Table 2-7. Community Space, Area Range

	Square Feet
Gymnasium	11,000 - 13,500
Gymnasium Storage	400 - 600
Kitchen	750 - 1,000
Child Watch/Activity Room	400 - 1,000
Teen Room	750 - 1,500
Senior Lounge	750 - 1,500
Preschool Education Rooms	750 - 1,500
Restrooms	250 - 550
Total	**15,050 - 21,150**

Source: CPW, 2009

Table 2-8 shows the indoor aquatic space for comparable facilities. On average, about one-third of facility space is allocated for aquatic facilities. Aquatic facilities typically comprise from 10,000 to 20,000 square feet of floor area, and average about 12,000 square feet. Some facility managers have also said that this is not large enough for some markets, which is the reason for the 20,000 sq. ft. range below.

Table 2-8. Indoor Aquatic Space, Area Range

	Square Feet
Natatorium	10,000 - 20,000
Leisure Pool	4,000 - 6,000
Spa	100 - 300
Pool Storage	300 - 600
Aquatics Office	150 - 300
Lifeguard Room	150 - 250
Total	**10,600 - 21,150**

Source: CPW, 2009

SUMMARY

The Canby Community Center will include a number of services and amenities including an aquatics center with pool and therapy spa, a gymnasium, a weight and fitness room, indoor track, multi-purpose room, locker rooms, family changing rooms, office space, and a reception area.

Table 2-9 shows a breakdown of the area ranges for a typical facility offering similar services and amenities. The total area ranges from roughly 40,000 sq. ft. to nearly 60,000 sq. ft. with indoor aquatics and community space comprising the largest portions of the facility.

Table 2-9. Total Facility, Area Range

	Square Feet
Building Support	4,400 - 6,900
Administration	900 - 1,700
Activity Space	5,050 - 7,500
Community Spaces	15,050 - 21,150
Indoor Aquatics	10,600 - 21,150
TOTAL	**36,000 - 58,400**

Source: CPW, 2009

CHAPTER III: MARKET AREA AND DEMAND

The purpose of this chapter is to define the primary and secondary market areas and describe factors that affect demand (e.g., use) for the proposed Canby Area Community Center. We begin by defining the primary and secondary market areas that the Center might reasonably expect to attract users from. We follow with a discussion of demand factors that includes demographic characteristics, sports and activity participation rates, and results of the household survey (see Appendix X for detailed survey results). While individually none of these factors will determine the exact level of demand for the Center, they provide an indication of potential use.

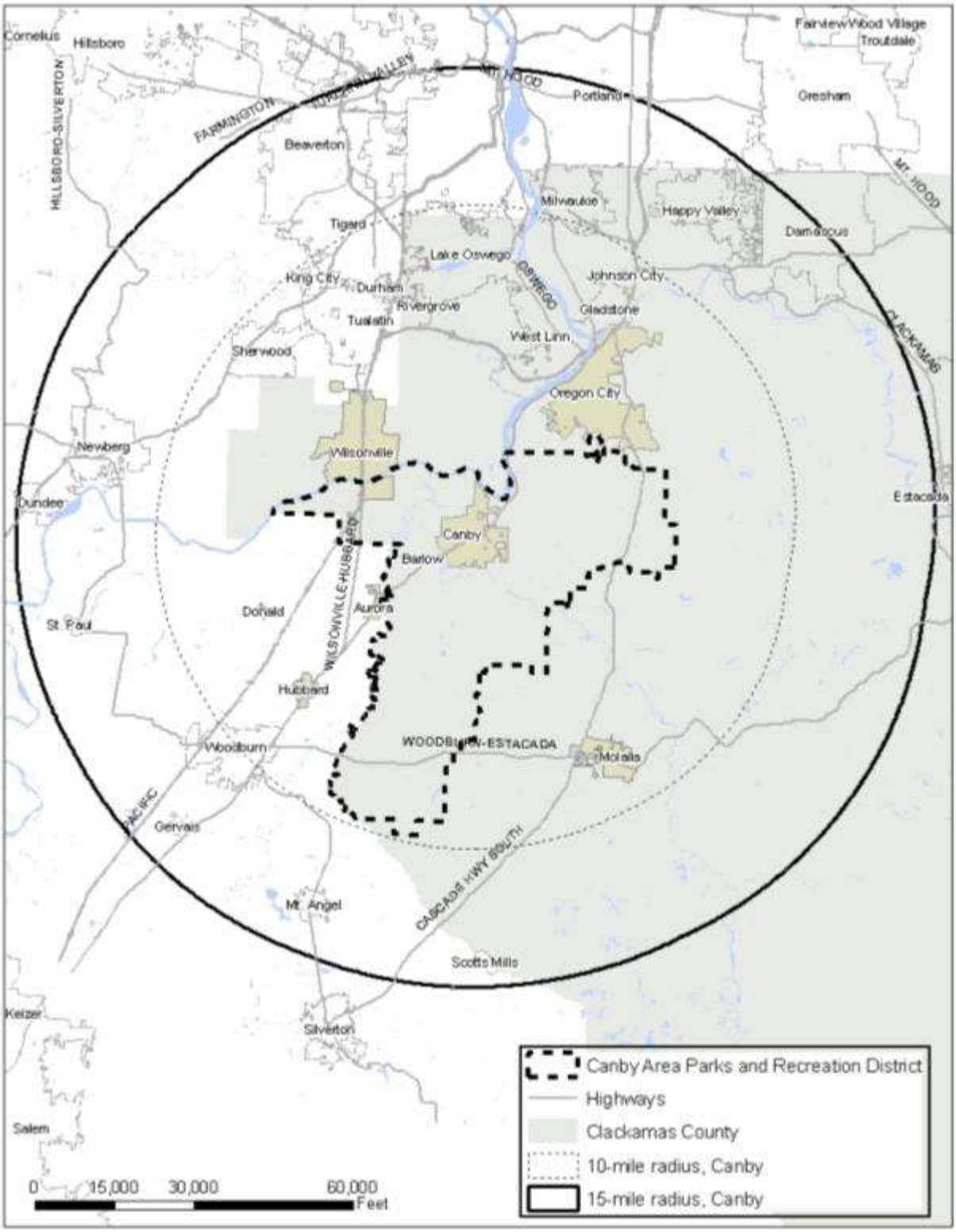
MARKET AREA DEFINITION

The determination of market areas is an important step in the process of estimating facility use. The number and type of residents, their demographic characteristics, and activity participation patterns can be used to develop an overall estimate of participation by activity for the market area.

Several market area definitions could be applied to this analysis. Market analysts typically define primary and secondary market areas. Based on input from the project steering committee, the primary market area the facility would serve includes all households within the Canby Area Park and Recreation District (CAPRD) boundary. The secondary market area would include areas within a 10- to 15-mile radius of the facility. Map 1 shows the CAPRD boundaries.

The facility may draw some use from outside of the primary market area; however, we expect this use to be mainly limited to recreational and athletic events. This is in part due to the way community centers get funded, as collected fees will not be enough to support the facility. Since taxes from the primary market area will be used to supplement the operations of the facility, residents in the primary market area will be the primary users of the facility.

Map 3-1. Primary and secondary market areas; primary market area is the Canby Area Park and Recreation District boundary



Source: CPW, 2009

DEMOGRAPHIC CHARACTERISTICS OF THE MARKET AREA

Demographic indicators help describe key characteristics of households in the market area. Population change, economic strength, and income levels all serve as indicators of broader community trends and have implications for facility design and use. CPW analyzed data on population, employment, and income trends for Oregon, Clackamas County, and Canby. We relied on a variety of data sources including the U.S. Census Bureau, the Oregon Prospector database (www.OregonProspector.com), the Oregon Employment Division, the Bureau of Economic Affairs, and the Center for Population Research and Census at Portland State University. A more detailed analysis of demographic information is provided in Appendix A.

Population

Table 3-1 shows population growth between 1990 and 2008 for Oregon, Clackamas County, surrounding communities, and the Canby School District. The data indicate that Clackamas County grew at a slightly higher rate than the state in general between 1990 and 2008 (2.00% annually compared to 1.92% annually), and that the City of Canby grew at a significantly faster rate than both (17.47% annually). The data from the 2000 Census is the most recent population data available at the time of this report for the Canby School District. It shows that with a growth rate of 1.64% annually, the Canby School District is growing slower than Clackamas County and the City of Canby.

Table 3-1. Population Trends in Oregon, Clackamas County, Clackamas County Cities, and the Canby School District, 1990-2008

Area	1990	2000	2008	1990-2008 Change	1990-2008 % Change	1990-2008 AAGR	2000-2008 AAGR
Oregon	2,842,321	3,436,750	3,791,075	354,325	10.31%	1.92%	1.23%
Clackamas County	278,850	340,000	376,660	36,660	10.78%	2.00%	1.29%
City of Canby	8,990	12,910	15,165	2,255	17.47%	3.69%	2.03%
City of Molalla	3,637	5,710	7,590	1,880	32.92%	4.61%	3.62%
City of Barlow	118	140	140	0	0.00%	1.72%	0.00%
City of Oregon City	14,698	26,200	30,405	4,205	16.05%	5.95%	1.88%
Clacksmas Co. Unincorporated	160,123	176,290	178,176	1,886	1.07%	0.97%	0.13%
City of Wilsonville*	7,106	13,991	17,940	3,949	28.23%	7.01%	3.16%
City of Aurora	587	660	970	310	46.97%	1.18%	4.93%
City of Hubbard	1,881	2,500	3,125	625	25.00%	2.89%	2.83%
City of Donald	316	620	1,025	405	65.32%	6.97%	6.49%
Canby School District	23,309	27,431	n/a	n/a	n/a	1.64%	n/a

Source: 2007 Oregon Population Report Table 4. Population Estimates for Oregon and Its Counties and Incorporated Cities: April 1, 1990-July 1, 2007; Center for Population Research and Census, Portland State University

* Portion of the City within Clackamas Co.
* Note: AAGR – Average Annual Growth Rate

Table 3-2 shows the population by age group for the Canby School District between 1990 and 2000. The largest age group of residents is individuals age 40-44, but the fastest growing age group in the district is people age 85 and over. Children under seventeen also comprise a large portion of the population, but although their numbers are higher than the older age groups, their growth is significantly slower. This has implications for the types of facilities that would be important to include in a community center for all age groups.

Table 3-2. Population Change by Age Category, Canby School District, 1990-2000

Age	1990	2000	Change	Percent Change	AAGR
Under Age 5	1,596	1,764	168	11%	1.01%
Age 5 to 9	1,768	2,012	244	14%	1.30%
Age 10 to 14	1,836	2,251	415	23%	2.06%
Age 15 to 17	1,090	1,347	257	24%	2.14%
Age 18 to 19	662	646	-16	-2%	-0.24%
Age 20 to 24	1,233	1,307	74	6%	0.58%
Age 25 to 29	1,423	1,340	-83	-6%	-0.60%
Age 30 to 34	1,724	1,650	-74	-4%	-0.44%
Age 35 to 39	1,942	2,002	60	3%	0.30%
Age 40 to 44	1,907	2,134	227	12%	1.13%
Age 45 to 49	1,665	2,098	433	26%	2.34%
Age 50 to 54	1,178	2,026	848	72%	5.57%
Age 55 to 59	1,003	1,648	645	64%	5.09%
Age 60 to 64	1,071	1,168	97	9%	0.87%
Age 65 to 69	1,110	976	-134	-12%	-1.28%
Age 70 to 74	827	993	166	20%	1.85%
Age 75 to 79	605	933	328	54%	4.43%
Age 80 to 84	389	593	204	52%	4.31%
Age 85 +	280	513	233	83%	6.24%
TOTAL	**23,309**	**27,401**	**4,092**	**18%**	**1.63%**

Source: 2009 Canby School District Demographic Report

*Note: AAGR – Average Annual Growth Rate

Table 3-3 shows the population projections through 2020 for Clackamas County. These data are relevant because the provide a forecast of the age distribution in the County (no forecasts are available for the CAPRD boundary). According to a 2009 Canby School District Report, certain age groups are projected to experience significant growth. Older residents are projected to experience over a 100% increase for residents between 60 and 74. Younger age groups (those under 20) are projected to experience modest growth of between 5% and 35%. Two age groups (45-49 and 50-54) are expected to decline in the next ten years. Canby Schools have seen a moderate decline in past years, but these projections show that this trend should be reversing with the increase in the school age population, especially children under 10 years old.

Table 3-3. Population Projections by Age Category, Clackamas County, 2000-2020

	2000	2020	Change 2000-2020	% Change 2000-2020
Total	340,000	460,323	120,323	35.4%
85+	4,980	7,690	2,710	54.4%
80 to 84	5,535	7,031	1,497	27.0%
75 to 79	8,185	12,797	4,612	56.4%
70 to 74	9,031	20,427	11,397	126.2%
65 to 69	9,914	25,566	15,652	157.9%
60 to 64	12,870	27,777	14,907	115.8%
55 to 59	19,382	27,644	8,262	42.6%
50 to 54	26,763	26,565	(198)	-0.7%
45 to 49	29,726	27,259	(2,467)	-8.3%
40 to 44	29,669	30,641	972	3.3%
35 to 39	26,156	37,345	11,189	42.8%
30 to 34	21,829	36,583	14,754	67.6%
25 to 29	19,262	32,459	13,198	68.5%
20 to 24	18,638	26,430	7,792	41.8%
15 to 19	24,125	25,370	1,244	5.2%
10 to 14	26,770	29,126	2,357	8.8%
5 to 9	24,959	30,080	5,121	20.5%
0 to 4	22,208	29,533	7,325	33.0%

Source: 2009 Canby School District Demographic Report

Table 3-4 shows households with children in Canby and Clackamas County. Though the percentage of households with children is below 50% for both locations, a greater percentage of households in Canby have children compared to Clackamas County. As Table 3-3 showed that there would be an increase in the number of children between 2000 and 2009, this has implications for the types of facilities that would be important at a community center. Children require specific amenities like play fields for organized sport leagues and daycare facilities.

Table 3-4. Households by Presence of Children, Canby and Clackamas County, 2000

	Canby	Percent	Clackamas County	Percent
All Households	4,489	100%	128,201	100%
Households with people under 18 years	1,923	43%	47,128	37%
Married Couple Families	1,434	74.6%	35,478	75.3%
Other Families	477	24.8%	11,098	23.5%
Nonfamilies	12	0.6%	552	1.2%

Source: U.S. Census Bureau

Table 3-5 shows households in Canby and Clackamas County with adults over the age of 60. Canby has a greater percent of seniors than Clackamas County, including a higher proportion of seniors living alone. The population of seniors is also supposed to increase significantly between 2000 and 2020, especially for people between the ages of 60 and 74. Seniors require different amenities than other residents, including space and time for organized activities in exercise rooms and the pool.

Table 3-5. Households by Presence of People 60 and Over, Canby and Clackamas County, 2000

	Canby	Percent	Clackamas County	Percent
All Households	4,489	100%	128,201	100%
Households with People over 60 Years	1,304	29.0%	34,435	26.9%
1-Person Households	562	43.1%	11,766	34.2%
Family Households	709	54.4%	21,610	62.8%
Nonfamily Households	33	2.5%	1,059	3.1%

Source: U.S. Census Bureau, 2000 Census

Employment

Table 3-6 shows labor force participation and unemployment for Canby and Clackamas County in 2008. Canby had a slightly lower percentage of its population that is unemployed (4.7%) than Clackamas County (5.4%) in 2008. There is projected to be no change in these percentages by 2013. However, the most recent county unemployment information shows a different picture. Unemployment in Clackamas County was at 11.5% in June 2009, which is a significant growth from June 2008, a one-year increase of 6.3%. More recent unemployment numbers do not exist yet for Canby, though there is reason to expect that they would be similar.

Table 3-6. Labor Force Participation and Unemployment, Canby and Clackamas County, 2008

	2008		2013	
	Canby	Clackamas County	Canby	Clackamas County
Total Labor Force	7,981	211,185	8,715	228,069
Employed	7,598 (95.2%)	199,478 (94.5%)	8,298 (95.2%)	215,383 (94.5%)
Unemployed	377 (4.7%)	11,353 (5.4%)	410 (4.7%)	12,303 (5.4%)

Source: Oregon Prospector, 2009; www.qualityinfo.org

Several employment sectors in Clackamas County have experienced growth since 2002 (see Table 3-7), most notably state government (10.7% AAGR) and natural resources and mining (5.4% AAGR). Other growing industries are education and health services, professional and business services, construction, and leisure and hospitality. Three sectors have seen a decline in jobs in Clackamas County since 2001: financial activities, local government, and federal government.

Table 3-7. Clackamas County Covered Employment, 2002, 2004, 2006, and 2008

Industry	2002	2004	2006	2008	AAGR*
Natural Resources & Mining	4,364	4,904	4,812	6,029	5.4%
Construction	9,155	9,450	11,789	11,930	3.6%
Manufacturing	18,134	17,883	18,326	18,638	0.4%
Trade, Transportation & Utilities	31,463	31,804	33,324	33,321	0.4%
Information	1,647	1,596	1,678	2,070	2.6%
Financial Activities	8,158	8,404	9,013	7,836	-0.8%
Professional & Business Services	13,378	14,592	16,332	17,492	4.0%
Education & Health Services	14,159	15,304	16,205	17,641	4.4%
Leisure & Hospitality	11,793	12,383	13,036	14,554	3.4%
Other Services	5,444	5,536	5,589	5,550	0.3%
Private Non-Classified	83	54	67	79	0.0%
Federal Government	2,045	1,284	1,282	1,405	-5.0%
State Government	1,051	1,505	2,165	2,235	10.7%
Local Government	13,085	13,075	13,394	12,109	-1.4%
TOTAL	**133,959**	**137,774**	**147,012**	**150,889**	**1.7%**

Source: *Covered Employment & Payrolls*, Oregon Employment Department. 2009

*This figure is based on data from 2001 to 2008

Income

Table 3-8 shows that Clackamas County has experienced higher per capita income than Oregon between 2000 and 2006, where Clackamas County has seen incomes up to 30% higher than those throughout the state. However, Clackamas County's income has been growing slower than Oregon, where Clackamas County has a 3.90% AAGR and Oregon has a 4.70% AAGR.

Table 3-8. Per Capita Personal Income, Oregon and Clackamas County, 2000-2006

Year	Oregon	Clackamas County
2000	28,096	36,568
2001	28,518	35,658
2002	28,931	35,316
2003	29,565	35,973
2004	30,621	37,631
2005	31,599	39,116
2006	33,299	41,378
Change	5,203	4,810
% Change	18.52%	13.15%

Source: Oregon County Economic Indicators, Oregon Employment Department, 2009

Table 3-9 shows that while Clackamas County has a higher per capita income than the State of Oregon, the City of Canby has a smaller percent of its households in the highest income brackets (over $75,000 per year) compared to Clackamas County. It is projected that in 2013, a smaller percentage of households will be in the bottom income brackets (below $50,000 per year) in both

Clackamas County and Canby, implying that incomes are expected to increase over the next five years.

Table 3-9. Total Household Income, Canby and Clackamas County, 2008 - 2013

	2008		2013	
	Canby	**Clackamas County**	**Canby**	**Clackamas County**
Under $10,000	4.0%	3.9%	3.5%	3.5%
$10,000 - $19,999	8.4%	6.1%	7.6%	5.3%
$20,000 - $29,999	9.4%	7.7%	8.5%	6.5%
$30,000 - $39,999	11.0%	9.3%	10.2%	8.0%
$40,000 - $49,999	9.9%	9.5%	7.9%	8.4%
$50,000 - $59,999	12.6%	9.4%	13.5%	9.7%
$60,000 - $74,999	11.6%	11.6%	10.6%	10.4%
$75,000 - $100,000	13.4%	14.2%	13.5%	14.3%
Over $100,000	19.8%	28.4%	24.8%	33.8%

Source: Oregon Prospector, 2009

Sports participation trends

Table 3-10 shows the national sports participation data between 1998 and 2008. Certain sports have seen noticeable growth in the past ten years, including weight lifting (6.4% AAGR), running and jogging (4.8% AAGR), and working out at a sports club (4.0% AAGR). Sports that have seen a decline in the past ten years include inline skating (-10.1% AAGR), dart throwing (-2.9% AAGR), softball (-2% AAGR), and volleyball (-1.9% AAGR).

Table 3-10. Sports participation by activity, at least one time per year (in millions), U.S., 1998-2008

Activity	1998	2000	2002	2004	2006	2008	AAGR
Weight Lifting	n/a	22.8	25.1	26.2	32.9	37.5	6.4%
Running/Jogging	22.5	22.8	24.7	26.7	28.8	35.9	4.8%
Workout at Club	26.5	24.1	28.9	31.8	34.9	39.3	4.0%
Aerobic Exercising	25.8	26.7	29	29.5	33.7	36.2	3.4%
Exercising with Equipment	46.1	44.8	46.8	52.2	52.4	63	3.2%
Football	8.1	8	7.8	8.6	10.1	10.5	2.6%
Exercise Walking	77.6	81.3	82.2	84.7	87.5	96.6	2.2%
Bowling	40.1	43.1	42.4	43.8	44.8	49.5	2.1%
Soccer	13.2	12.9	13.7	13.3	14	15.5	1.6%
Tennis	11.2	10	11	9.6	10.4	12.6	1.2%
Swimming	58.2	58.8	53.1	53.4	56.5	63.5	0.9%
Target Shooting	18.9	16.9	18.9	19.2	19.1	20.3	0.7%
Camping	46.5	49.9	55.4	55.3	48.6	49.4	0.6%
Martial Arts	4.6	5.4	4.2	4.7	n/a	n/a	0.4%
Bicycle Riding	43.5	43.1	39.7	40.3	35.6	44.7	0.3%
Basketball	29.4	27.1	28.9	27.8	26.7	29.7	0.1%
Racquetball	4	3.2	n/a	n/a	4	n/a	0.0%
Billiards/Pool	32.3	32.5	33.1	34.2	31.8	31.7	-0.2%
Baseball	15.9	15.6	15.6	15.9	14.6	15.2	-0.4%
Cheerleading	3.1	n/a	n/a	3.8	3.8	2.9	-0.7%
Volleyball	14.8	12.3	11.5	11.8	11.1	12.2	-1.9%
Softball	15.6	14	13.6	12.5	12.4	12.8	-2.0%
Dart Throwing	20.8	17.4	18.5	n/a	n/a	n/a	-2.9%
Inline Skating	27	21.8	18.8	11.7	10.5	9.3	-10.1%
Wrestling	n/a	n/a	n/a	n/a	3.2	n/a	n/a
Yoga	n/a	n/a	n/a	n/a	n/a	16	n/a

Source: National Sporting Goods Association, 2009

Table 3-11 shows sports participation by active in Oregon for 2008. All of the activities listed are potential activities that might take place at the proposed community center and sports field facilities. Listed next to these activities are the average participation days per year by residents of Oregon, compiled by the National Sporting Goods Association. Not surprisingly, exercise walking is the most frequent activity with 103 participation days per year per person—a trend that mirrors national trends. Other popular activities include running & jogging (90 days per year), aerobic exercising (89 days per year), and yoga (67 days per year). Basketball and volleyball are the least popular activities with 16 and 22 days per year respectively.

Table 3-11. Oregon Sports Participation, 2008

Activity	Average Participation Days per Person
Exercise Walking	104
Running/Jogging	90
Aerobic Exercising	89
Workout at a Club	70
Yoga	67
Exercising with Equipment	64
Softball	63
Swimming	62
Baseball	60
Weight Lifting	53
Soccer	45
Football	43
Volleyball	22
Basketball	16

Source: National Sporting Goods Association, 2009

Table 3-12 shows the sports participation of households in the CAPRD boundary from the CPW survey. Over three-quarters of respondents indicated that they participate in walking as a form of exercise, which is the largest percentage of any activity. Other popular activities include biking (46%), strength and flexibility (42%), and running and jogging (40%). All of those activities can take place in a community center. The least popular activities were squash (0%), rugby (2%), and wrestling (2%).

Table 3-12 –Sports/Activities Participated in During the Last 12 Months, Canby, 2009

Activities	Number	Percent
Walking	188	76.4%
Biking	114	46.3%
Strength and flexibility	103	41.9%
Running/Jogging	99	40.2%
Treadmill/Stair machine	91	37.0%
Weight training	91	37.0%
Bowling	82	33.3%
Arts & Crafts	74	30.1%
Golf	73	29.7%
Aquatics	67	27.2%
Aerobics	64	26.0%
Basketball	61	24.8%
Soccer	59	24.0%
After school programs	57	23.2%
Performing Arts	56	22.8%
Dance	51	20.7%
Swimming (laps)	48	19.5%
Yoga/Tai Chi	48	19.5%
Swimming (lessons)	43	17.5%
Baseball	42	17.1%
Football	38	15.4%
Pilates	37	15.0%
Tennis	37	15.0%
Softball	34	13.8%
Rock climbing	29	11.8%
Volleyball	29	11.8%
Water Aerobics	29	11.8%
Parent/Child programs	28	11.4%
Indoor Soccer	27	11.0%
Senior activities	26	10.6%
Track and field	26	10.6%
Frisbee (Ultimate, Golf)	24	9.8%
Equestrian	23	9.3%
Horseshoes	23	9.3%
Skateboarding	22	8.9%
Racquetball	20	8.1%
Marathon/triathlon	17	6.9%
Other (Please specify)	16	6.5%
Boxing/Martial Arts	15	6.1%
Gymnastics	12	4.9%
Rowing (incl. machines)	10	4.1%
Lacrosse	7	2.8%
Rugby	6	2.4%
Wrestling	6	2.4%
Squash	0	0.0%
TOTAL	**246**	**100.0%**

Source: Canby Community Center and Sports Field Complex Survey, CPW, 2009

The CPW survey also asked households to list the top three activities that they participate in the most frequently, and to estimate the number of days they participated in those activities in the last year. Table 3-13 shows these activities. A relatively large number of respondents indicated that they, or someone in their household, walked, played soccer, or swam at least twice a week.

Additionally, respondents indicated that they participated in activities like yoga, aerobics, and weight training at least three times a week. This suggests that indoor activities that would be supported by the proposed community center would be used frequently.

Table 3-13. City of Canby Survey, Frequency and Age of Participation for Top 3 Activities

Activity	Number of Respondents	Average Age	Average Days	Average Days/Week
Walking	98	36.0	160.1	3
Soccer	45	11.0	90.3	2
Swimming/Aquatics	45	21.9	79.8	2
Running	37	40.2	180.0	4
Biking	37	34.7	105.5	2
Baseball/Softball	30	20.6	89.1	2
Weight training	28	35.7	146.9	3
Basketball	27	18.1	105.3	2
Golf	27	44.0	45.0	1
Arts & crafts	26	31.4	137.0	3
Treadmill/stair machine	20	52.4	147.7	3
Aerobics	19	35.6	152.3	3
Football/Rugby	19	14.4	86.9	2
Dance	18	35.2	91.6	2
Yoga/Pilates	17	44.0	187.7	4
Equestrian	15	34.1	220.5	5
Strength & Flexibility	13	42.2	121.9	3
Exercise club	10	48.0	162.6	3
Tennis	10	20.5	76.2	2
Skateboard	7	21.0	226.9	5
Volleyball	7	19.2	136.5	3
After school program	6	8.8	57.8	1
Senior activities/Exercise	5	79.5	114.3	2
Racquetball	4	43.0	77.5	2
Hiking	4	47.8	18.5	0

Source: Canby Community Center and Sports Field Complex Survey, CPW, 2009

KEY FINDINGS

The following is a list of key findings from the demographic, economic, and sports participation data presented in this chapter:

- Canby has grown faster than Clackamas County and Oregon.
- Population over age 60 is the fastest growing age group in Canby. The elderly population of Canby will see growth over 100% from 2000 to 2020, especially people between the ages of 60 and 74. As this population increases, the need for facilities to cater to their interest in activities increases.
- Children under age 18 continue to be a large portion of the population of Canby and are projected to keep increasing in number, despite recent enrollment decreases in the Canby School District.
- Canby has a greater percentage of households with children and older people than Clackamas County.
- Canby showed a slightly lower unemployment rate than Clackamas County in 2008, though information does not exist to compare the two with the most recent economic decline.
- Clackamas County has a higher per capita income than Oregon, showing that residents of Clackamas County have comparatively more money to use on activities and a higher tax base.
- Both Clackamas County and Canby are projected to see household income increases through 2013, though Clackamas County will still have a higher per capita income.
- According to a survey of Canby residents, the most popular sports in terms to activity days in Canby are walking, biking, strength and flexibility exercises, using a treadmill, running, and lifting weights, all activities that could be done in a community center with the appropriate facilities.

IMPLICATIONS

Several demographic trends are relevant to the proposed community center. First, population has grown and is expected to continue to grow over the next ten to twenty years. Other things being equal, increased population equates to a larger base market and increased facility use.

Canby's age distribution has significant implications for the final design program of the proposed community center. With large, growing percentages of youth and senior citizens, the Canby Community Center will need to offer a broad range of programs that appeal to all age levels.

Though Canby has lower per capita income relative to Clackamas County, income in both locations is expected to increase through 2013. This has implications for the fee structure for the proposed facility. It is important to create a fee structure that allows access for low income members of the community but can still maximize cost recovery.

CHAPTER 4: LOCAL FACILITY INVENTORY

The purpose of this chapter is to describe the existing inventory of swimming and community center facilities in the Canby market area. Any existing facilities can be considered as potential competition to the proposed facilities (e.g, the *supply* analysis). This chapter describes local facilities that offer activities similar to those proposed at the Community Center. The supply analysis helps to determine if existing facilities are sufficient to meet local demand and whether the proposed Canby Community Center would capture a large enough portion of that demand to be financially feasible.

LOCAL FACILITIES

Analysis of the supply of similar recreational facilities in the CAPRD district reveals that no facilities currently exist that have all of the facilities, amenities, and activities of the proposed community center and sports field complex. However, two municipal facilities provide some of the services of the proposed facility which may cause an overlap of programs and services offered. These facilities are detailed in Table 4-1 below.

Table 4-1. Local Municipal Supply, CAPRD District

Facility Name	Amenities	Programs Offered	Additional Information
Canby Swim Center	Indoor 25-yard pool with ADA lift, dressing room with toilets and showers, lobby, bleachers	Open swim, swim lessons, lap swim, adult and senior swim, masters swimming, water exercise, scuba lessons, youth swim team	Facility is scheduled to close
Canby Adult Center	Billiards room, cafeteria, library, computer room, exercise room, multi-purpose room, library, video lounge	Meals-on wheels services, adult classes, tax preparation assistance, health & legal consulation, transportation services	Facility does not offer exercise space/equipment

Source: Canby Parks and Recreation Master Plan, 2002

It is important to note that while the Canby Swim Center may appear to offer many of the same aquatic services proposed for the community center, the facility is scheduled to close in 2011 and will not create an overlap of supply. Additionally, the Canby adult center currently provides a number of services to the senior population of Canby, yet the facility does not offer exercise opportunities. Coordination between the proposed community center and the Canby Adult Center is encouraged to ensure that both facilities offer unique programming and services.

REGIONAL FACILITY INVENTORY

As shown in Figure 4-1, regional inventory of swim centers and community center is primarily concentrated north of Canby in the Portland Metro Area. Within the CAPRD district, only the Canby Swim Center, soon to be closed, was identified as a comparable/competing facility. Even within a ten-mile radius of Canby, only a few facilities exist that offer programs and activities similar to those proposed for the Canby community center and sports field complex.

Within this ten-mile radius, or secondary service area outside of the CAPRD district, community centers and pools exist in Molalla, Wilsonville, and Oregon City. Map 4-1 shows the location of

these facilities, and Table 4-2 summarizes key characteristics of the facilities. As Table 4-2 illustrates, none of these facilities provide all of the services that the proposed Canby community center and sports field complex will offer. Additionally, the commute that is required undoubtedly restricts portions of Canby residents from using these facilities.

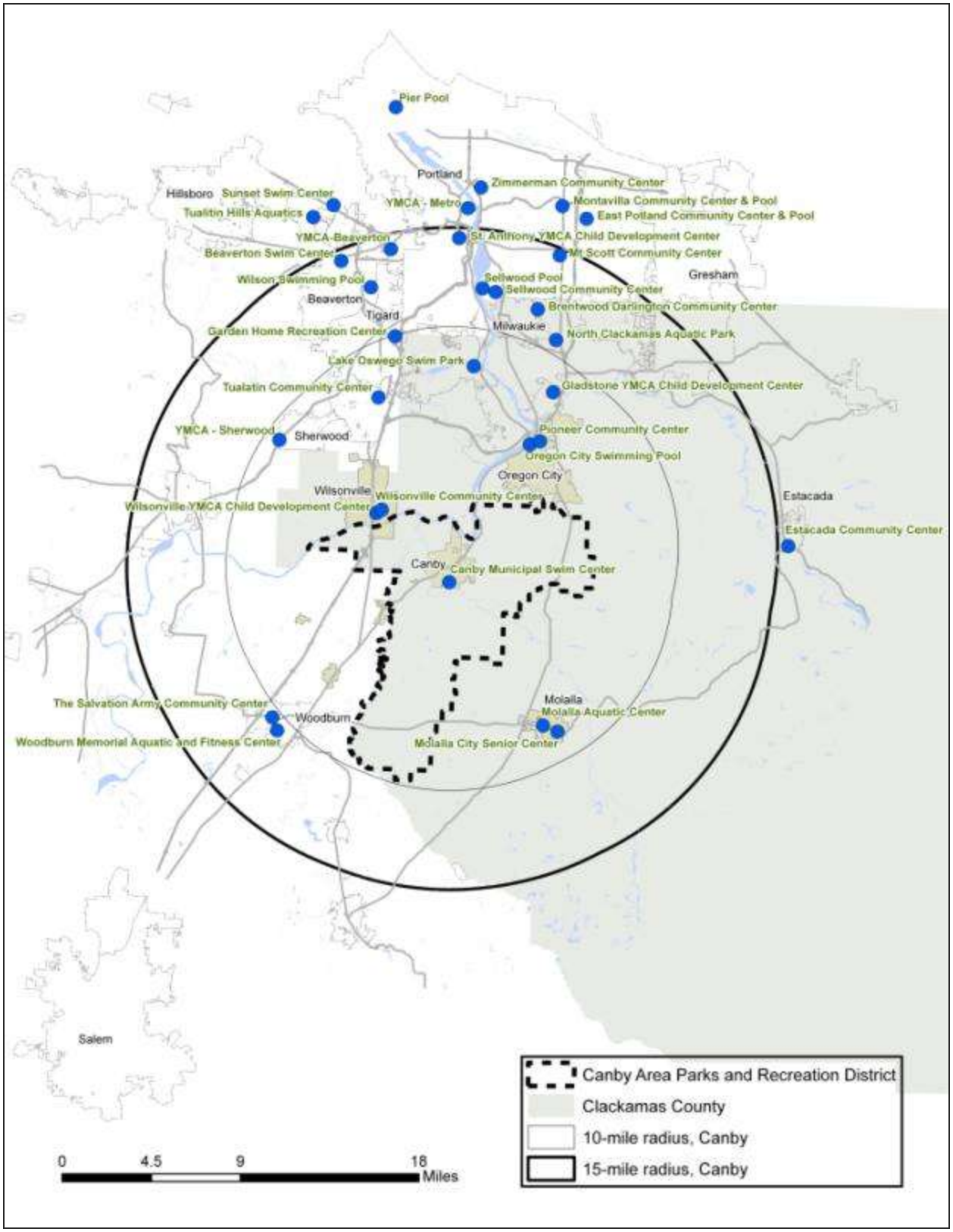
Within a fifteen-mile radius, the range of community center and swimming pool options expands significantly. Locations in Woodburn, Tigard, Beaverton, and Milwaukie offer a wide range of aquatic and fitness activities. Again, because of the distance of these facilities from Canby, they are not considered to serve the primary market area.

CHARACTERISTICS OF LOCAL AND REGIONAL FACILITIES

As shown in Table 4-2, the majority of facilities have only one or two of the major programs or amenities proposed for the Canby facility. Only one facility, the Southwest Portland Community Center, offers all of the major services proposed for the Canby Community Center including a swimming pool, fitness center, multi-purpose rooms, and access to sports fields at nearby Gabriel Park.

Analyzing these facilities shows a lack of facilities offering a comprehensive recreation facility and sports field complex both in the CAPRD district and the surrounding market area. The limited inventory suggests that the proposed Canby facility will help to meet demand for a modern, multi-use facility that is currently under-supplied in the region.

Figure 4-1. Location of Local and Regional Pool/Community Center Supply



Source: CPW, 2009

Table 4-2. Local and Regional Supply Characteristics

Facility Name	Target	Swimming Pool	Fitness Area	Multi-Purpose Room(s)	Sports Field(s)
Wilsonville YMCA Child Development Center	Youth/Child				
Wilsonville Community Center	All Ages		X	X	
Molalla City Senior Center	Seniors				
Pioneer Community Center	Seniors		X	X	
Gladstone YMCA Child Development Center	Youth/Child				
Lake Oswego Adult Community Center	Seniors			X	
Milwaukie Community Center	Seniors			X	
Mt Scott Community Center	All Ages	X	X	X	
Sellwood Community Center	All Ages		X	X	
Fulton Park and Community Center	All Ages		X	X	
Garden Home Recreation Center	All Ages		X	X	
Zimmerman Community Center	All Ages			X	
Brentwood Darlington Community Center	All Ages			X	
Estacada Community Center	All Ages		X	X	
Woodstock Community Center	All Ages		X	X	
Conestoga Recreation & Aquatic Center	All Ages	X	X	X	
St. Anthony YMCA Child Development Center	Youth/Child			X	
Southwest Portland Community Center	All Ages	X	X	X	X
The Salvation Army Corps Community Center	Youth/Child			X	
North Clackamas Aquatic Park	All Ages	X		X	
Molalla Aquatic Center	All Ages	X		X	
Oregon City Swimming Pool	All Ages	X		X	
Wilson Swimming Pool	All Ages	X			
Lake Oswego Swim Park	All Ages	X			
Woodburn Memorial Aquatic and Fitness Center	All Ages	X	X	X	
Tualitin Hills Aquatics	All Ages	X			
Harman Swim Center	All Ages	X			
Raleigh Swim Center	All Ages	X			
Beaverton Swim Center	All Ages	X		X	
Sunset Swim Center	All Ages	X		X	
East Portland Community Center & Pool	All Ages	X	X	X	
Matt Dishman Community Center & Pool	All Ages	X	X	X	
Montavilla Community Center & Pool	All Ages	X	X	X	
Pier Pool	All Ages	X			
Sellwood Pool	All Ages	X			
YMCA - Sherwood	All Ages	X	X	X	
YMCA- Beaverton	All Ages	X	X	X	
YMCA - Metro Area	All Ages	X	X	X	
Canby Municipal Swim Center	All Ages	X			

Source: CPW, 2009

CURRENT USE OF LOCAL FACILITIES

Based on the CPW household survey, respondents indicated that they use a number of private, public, and non-profit facilities in Canby to meet their recreational needs. Private facilities that are

used by Canby residents include archery ranges, bowling alleys, and dance studios. Specifically, respondents indicated that they used the Hope Village Retirement Center, the Willamette Valley Country Club and Pool, and Metro Gymnastics of Tigard on a regular basis.

A number of respondents indicated that they participate in team sports provided by the Canby Kids program. Another non-profit facility that was respondents indicated they used to meet their current recreation needs was the Elks Lodge gymnasium.

Public facilities that were popular among survey respondents include Canby bike paths and the fairgrounds for events and horse riding. Canby Skate Park, Canby Adult Center, and the Molalla River State Park were also said to be used with regularity.

While each of these facilities meets a specific recreational demand for the respondents of the CPW survey, the overwhelming response from the survey shows that despite currently using other recreational facilities, Canby area residents plan to utilize the proposed community center and sports field complex (See Appendix C).

PROPOSED FACILITIES IN THE MARKET AREA

CPW did not identify and pending plans for similar recreational facilities in the CAPRD district, or primary market area.

Outside of the market area, Portland State University plans to open a 100,000 square-foot student recreation center during the 2009-2010 school year. Additionally, Portland Parks and Recreation is currently in the planning and design process for the Washington High Community Center in southeast Portland. Final plans for this facility will be announced in September 2009.

OPERATIONAL CHARACTERISTICS OF COMPARABLE FACILITIES

CPW identified five facilities in the same geographic region as the proposed Canby Community Center. Facilities were selected primarily based on the amenities offered, size and the year they were built. Attention was also paid to the market size of each facility, although accurate market size data was not available in all locations.

The information collected from these facilities has been used for estimation purposes only. No facility – however similar it may be to the proposed Canby Community Center – is an exact match. We have attempted to control for variation between these facilities through our analysis. Certain information from certain facilities was excluded from the analysis offered in Chapter V if it was deemed to be an outlier.

The following tables summarize the results of CPW's review of the five comparable facilities. Some information from each facility was not available at the time of inquiry.

Size

Table 4-3 shows the size of the comparable facilities in square feet. The average size for community centers in this analysis was 57,000 ft^2. Despite having the largest market area, the East Portland Community Center has the smallest square footage of the five comparable facilities.

Table 4-3. Comparable Facilities, Square Footage

Name	Square Feet	Site Size (acres)
East Portland CC	45,000	5.7
Federal Way CC	72,000	10
Lincoln City CC	65,000	3
Sherwood YMCA	55,000	5
Southwest Portland CC	48,000	Not available
Average	**57,000**	**5.9**

Source: CPW, 2009

Building Costs

Table 4-4 shows the building costs for the comparable facilities. Two of the facilities underwent significant renovations/additions, which are shown under the original cost column and factored into the 2008 inflation-adjusted cost. Using the adjusted cost and the square footage from Table D-1, the cost per square foot was able to be estimated, showing that the average cost per square foot was $254.

Table 4-4. Comparable Facilities, Building Costs

Name	Original Cost	Adjusted Cost[1]	Cost per Sq. Ft.	Year Built
East Portland CC	$4,500,000 (1998), $9,500,000 (2009)	$15,454,714	$343	1998/2009
Federal Way CC	$20,500,000	$21,325,664	$296	2007
Lincoln City CC	$1,800,000 (1979), $2,200,000 (2004)	$7,859,801	$121	1979/2004
Sherwood YMCA	Not available	Not available	Not available	1998
Southwest Portland CC	$9,500,000	$12,299,420	$256	1999
Average	**$12,000,000**	**$14,234,900**	**$254**	**-**

Source: CPW, 2009

[1]Adjusted cost is based on inflation data from the US Bureau of Labor Statistics and is adjusted to 2009 dollars (http://data.bls.gov/cgi-bin/cpicalc.pl).

Visitation

Table 4-5 shows the visitation numbers from 2008 for each of the comparable facilities. When compared to the market area for each of the facilities, only the East Portland Community Center did not have more visits in 2008 than the market area. The Sherwood YMCA had significantly more visits than the other facilities, with 18 visits per capita.

Table 4-5. Comparable Facilities, Visitation

Name	Market Area	Visitation (2008)	Visitation (per capita)
East Portland CC	320,000	253,500	0.8
Federal Way CC	83,000	Not Available	Not Available
Lincoln City CC	10,000	81,000	8.1
Sherwood YMCA	16,000	288,000	18.0
Southwest Portland CC	150,000	432,000	2.9
Average	**115,800**	**263,625**	**7.4**

Source: CPW, 2009

Amenities

The amenities offered by these facilities, as reported by community center managers, are listed below. Each of the five comparable facilities has the following characteristics: aquatic center/lap pool, gym facilities like weight rooms and basketball courts, and meeting rooms. Most of the facilities have senior centers and kitchens, while only some of the facilities have amenities like outdoor playgrounds and sports fields, teen centers, party rooms, snack bars, and indoor climbing walls.

- *East Portland Community Center*. 15,000 ft^2 aquatic center with several 'green' features, lap pool, basketball courts, fitness room, gym, meeting room, kitchen, party room, rock climbing wall, weight room, family changing room.
- *Federal Way Community Center*. Six lane lap pool, diving board, leisure pool, three gyms, steam room, multipurpose rooms, walking/jogging track, senior lounge, kitchen, aerobics studio, weight room.
- *Lincoln City Community Center*. Aquatic center, diving boards, spa (in process) rock climbing wall, gymnasium, meeting rooms, senior center, nearby outdoor sports fields.
- *Sherwood YMCA*. Aquatic center, gym, meeting rooms, weight room, cardio room, snack bar, childcare facility, outdoor playground, senior center, teen center, aerobic studios.
- *Southwest Portland Community Center*. Aquatic center, lap pool, exercise studio, double court gym, childcare center, multipurpose room with kitchen, party rooms, watershed resource center, kitchen, party room, outdoor courtyard.

Operating Costs

The operating costs of the five comparable facilities are listed in Table 4-6 below, ranging from $965,000 per year to $3,617,575. The operating costs per square foot were also determined and they range from $14.85 to $75.37 per square foot.

Table 4-6. Comparable Facilities, Operating Costs

Name	Operating Costs (2008)	Operating Costs per Sq. Ft.
East Portland CC	$2,481,635	$55
Federal Way CC	Not available	Not available
Lincoln City CC	$965,000	$15
Sherwood YMCA	$2,600,000	$47
Southwest Portland CC	$3,617,575	$75
Average	**$2,416,053**	**$48**

Source: CPW, 2009

Revenue

Table 4-7 shows the revenue for each facility, including the per visit revenue as well as the percent of operating costs recovered from visitor revenue. The Sherwood YMCA was able to make up 100% of its operating costs through user fees, while the other three that provided information were between 39% and 58%.

Table 4-7. Comparable Facilities, Revenue

Name	Revenue (2008)	Per Visit Revenue	Cost Recovery (2008)
East Portland CC	$1,422,595	$6	57%
Federal Way CC	Not available	Not available	Not available
Lincoln City CC	$380,000	$5	39%
Sherwood YMCA	$2,600,000	$9	100%
Southwest Portland CC	$2,105,808	$5	58%
Average	**$1,627,101**	**$6**	**64%**

Source: CPW, 2009

Staffing

Table 4-8 shows the number of employees needed to staff the facilities. Lincoln City Community Center, with the smallest market area, is the facility with the most full-time staff but also the least part-time staff. Southwest Portland Community Center had the most staff overall, which corresponds with its relatively large market area. The Sherwood YMCA is the facility with the market area most comparable to Canby, and it has 8 full-time staff and 175 part-time staff.

Table 4-8. Comparable Facilities, Employment

Name	Full-time	Part-time
East Portland CC	8	Not available
Federal Way CC	Not available	Not available
Lincoln City CC	16	16
Sherwood YMCA	8	175
Southwest Portland CC	9	250
Average	**10**	**147**

Source: CPW, 2009

KEY FINDINGS

The following is a list of key findings from the local supply and comparable facility data presented in this chapter:

- Canby Swim Center is the only local public aquatic center, and it is scheduled to close in 2011.
- The Canby Adult Center offers a number of programs and services for senior citizens, but it does not offer fitness programs or exercise equipment.
- Regional supply of community centers is sparse, and none of the facilities offer all of the programs and services that the proposed Canby Community Center will offer.
- Only one facility within a 15-mile radius of Canby, the Southwest Portland Community Center, offers a community center and sports field complex.
- Despite using other private facilities for exercise and recreation, survey respondents indicated that they would use the proposed Canby Community Center.
- There are no plans to build a comparable facility within a 10-mile radius of Canby.
- Comparable facilities in the area researched average approximately 55,000 square feet and cost around $14 million.

IMPLICATIONS

The lack of comparable facilities in the primary and secondary market area indicates that the proposed community center would be well-attended. Only one facility has all of the amenities proposed for the Canby Community Center, which suggests that the market for a multi-purpose community center and sports field complex is not fully saturated in the region.

The closing of the Canby Swim Center may provide an ideal time to propose the bond measure to support the Canby Community Center. After the Swim Center closes, there will be no large public aquatic centers in Canby, leaving a large amount of demand unmet.

Comparable facilities are not ideal for comparisons in all respects. Careful analysis is needed to extract useful data from the selected facilities in order to draw conclusions for the financial feasibility of the proposed facility.

CHAPTER 5: PRELIMINARY FEASIBILITY ANALYSIS

This chapter provides our preliminary feasibility analysis for the proposed Canby Community Center. We begin by presenting rough construction cost estimates, then develop facility use estimates which are combined with potential fee structures to determine the financial feasibility of the proposed facility.

CONSTRUCTION COST ESTIMATES

CPW developed rough construction cost estimates based on review of comparable facilities. The estimates shown in Table 5-1 are based on cost per square foot figures we received from our review of comparables. We developed a range of estimates based on a range of cost per square foot assumptions. These reflect design choices that the community will eventually make during the architectural and engineering phase of the project. We assumed a 50,000 square foot facility. We did *not* include the cost of land in our estimates. This could vary substantially depending on the size and location of the site and whether the Community Center is co-located with the sports fields.

Table 5-1 show shows CPW's rough construction cost estimates. Based on cost per square foot and facility size assumptions, we estimate the total construction cost of the facility to be between $13.8 million and $16.3 million. Obviously, the final design and location of the facility could result in a total cost that is more or less than this range.

With respect to specific cost categories, our review of other facilities indicates that architectural and engineering costs typically range from 6 percent to 10 percent of the total project cost. We assumed 8 percent, which yields design costs between $1,100,000 and $1,320,000. Not surprisingly, the building costs account for the majority of project costs. We assumed building costs would be 80 percent of the total project costs. Other costs (permits, equipment, site preparation, etc.) typically range from 10 percent to 20 percent of the total project cost. We assumed 12 percent.

The construction cost estimates shown in Table 5-1 are based on the preliminary facility concept described in Chapter II. Because we are not reviewing a specific facility on a specific site, the construction cost estimates should be considered preliminary. More detailed estimates must be developed during the design and engineering phase.

Table 5-1. Facility Cost Estimates[1]

Cost Category	Percent of Total Cost	Cost Per Square Foot $ 275.00	$ 300.00	$ 330.00
Land Cost	n/a	n/a	n/a	n/a
Architectural & Engineering Cost	8%	$ 1,100,000	$ 1,200,000	$ 1,320,000
Building Cost	80%	$ 11,000,000	$ 12,000,000	$ 13,200,000
Other Cost	12%	$ 1,650,000	$ 1,800,000	$ 1,980,000
Total Cost	100%	$ 13,750,000	$ 15,000,000	$ 16,500,000

Source: CPW, 2009

[1] These estimates are based on the facility concept described in Chapter II.

Because the facility reviewed in this analysis is only at the conceptual stage, some change in the final construction cost estimate is inevitable. The final facility design should include much more detailed construction cost estimates. These more detailed cost estimates will include a line-item

analysis for various facility components. This should result in a more refined cost estimate than the dollars per square foot method we applied.

FACILITY USE ESTIMATES

The preliminary feasibility and cost recovery analysis is based, in part, on assumptions regarding facility use. Facility use estimates are in turn based upon a number of assumptions that will be outlined throughout this section. First, we assume the final facility will adhere to the design program outlined in Chapter II of this report. This means that the facility will include an aquatic center, gymnasium, and exercise equipment among other features. Implicit in this analysis is that the facility will offer programs in all of these areas, it will be well managed, and it will perform like comparable facilities.

The following shows the formula that was used for this basic use model:

1. Local Use Rate x Market Area Population = Estimated Market Area
2. Estimated Market Area x Average Participation Days Per Year = Estimated Market Area Days Per Year
3. Estimated Market Area Days Per Year x Capture Rate = Estimated Facility Use Days Per Year

To work through this equation, we assume that the frequency of participation in the market area is similar to statewide patterns as reported by the NSGA and local participation rates reported on the household survey. We also made assumptions about how much of the local use will be captured at the proposed facility. In general, we used conservative capture rates in our estimates, and the same rates were held constant for each scenario. Capture rates ranged from 0% for exercise walking to 45% for swimming/aquatics.

Capture rates are based on a review of local supply and represent our best estimate of how much local use might occur at the proposed facility.

The first step is to determine the size of the primary market area and estimate a capture rate for that market area. Therefore, we established a range of possible use rates that form the foundation of our analysis. This range is captured in the scenarios described below.

Scenario A (High Participation)

This scenario assumes that 70% of the total market area population will use the proposed facility at least once each year. This figure reflects the percentage of household survey respondents that indicated they would use the facility. CPW believes that this figure to be artificially high because (1) respondents were likely to overestimate use, and (2) respondents that want the facility were more likely to respond to the survey.

Scenario B (Medium Participation)

This scenario assumes that 50% of the total market area population will use the proposed facility in a given year. CPW considers this to reflect the average use scenario, which will result in approximately 14,500 market area participants (see Table 5.2).

Scenario C (Low Participation)

This scenario operates under the assumption that 30% of the total market area population will use the proposed facility. Based on current local supply and the level of public support for the facility, CPW believes this scenario to represent the lower bounds of the market area participant population.

Table 5.2. Market Area Population Scenarios

	Scenario A	Scenario B	Scenario C
	High Participation	Medium Participation	Low Participation
2000 Canby School District Population	27,431	27,431	27,431
Estimated Market Area Population	27,431	27,431	27,431
Reported Use Rate	70%	50%	30%
Estimated Market Area Participants	**19,202**	**13,716**	**8,229**

Source: CPW, 2009.

For each of these three use scenarios, CPW estimated the total annual visits to the proposed facility. The facility estimates are shown in Tables 5.3 – 5.5. Using the median values of each scenario, we estimate that the proposed facility would receive between 80,000 and 190,000 visits annually during the first few years of operation.

Table 5-3. Facility Use Estimates – Scenario A (High Participation)

					Capture Rate			Estimated Use		
Activity/Program	**Percent of Survey Respondents Participating**	**Estimated Market Area Participants**	**Average Participation Days Per Year**	**Estimated Market Area Days Per Year**	**High**	**Medium**	**Low**	**High**	**Medium**	**Low**
Exercise Walking	76%	14,670	103.5	1,518,942	1.0%	0.5%	0.0%	15,200	7,600	-
Swimming/Aquatics	27%	5,223	61.9	323,243	45.0%	40.0%	35.0%	145,500	129,300	113,100
Running/Jogging	40%	7,719	90.4	697,728	1.0%	0.5%	0.0%	7,000	3,500	-
Treadmill/Stair Machine	37%	7,105	63.7	452,352	5.0%	2.5%	1.0%	22,600	11,300	4,500
Weight Training	37%	7,105	52.8	375,338	5.0%	2.5%	1.0%	18,800	9,400	3,800
Aerobics	26%	4,992	89.1	445,026	5.0%	2.5%	1.0%	22,300	11,100	4,500
Basketball	25%	4,762	16.1	76,716	10.0%	5.0%	2.5%	7,700	3,800	1,900
Dance	21%	3,975	91.6	364,087	2.0%	1.0%	0.0%	7,300	3,600	-
Yoga/Tai Chi/Pilates	20%	3,744	66.9	250,496	5.0%	2.5%	1.0%	12,500	6,300	2,500
Rock Climbing	12%	2,266	n/a	n/a	50.0%	40.0%	30.0%	n/a	n/a	n/a
Volleyball	12%	2,266	21.7	49,145	2.0%	1.0%	0.0%	1,000	500	-
TOTAL VISITS								**259,900**	**186,400**	**130,300**

Sources: NSGA Sports Participation Survey, 2009, CPW Household Survey, 2009

Table 5-4. Facility Use Estimates – Scenario B (Medium Participation)

Activity/Program	Percent of Survey Respondents Participating	Estimated Market Area Participants	Average Participation Days Per Year	Estimated Market Area Days Per Year	Capture Rate			Estimated Use		
					High	Medium	Low	High	Medium	Low
Exercise Walking	76%	10,479	103.5	1,084,959	1.0%	0.5%	0.0%	10,900	5,400	-
Swimming/Aquatics	27%	3,731	61.9	230,888	45.0%	40.0%	35.0%	103,900	92,400	80,800
Running/Jogging	40%	5,514	90.4	498,377	1.0%	0.5%	0.0%	5,000	2,500	-
Treadmill/Stair Machine	37%	5,075	63.7	323,108	5.0%	2.5%	1.0%	16,200	8,000	3,200
Weight Training	37%	5,075	52.8	268,098	5.0%	2.5%	1.0%	13,400	6,700	2,700
Aerobics	26%	3,566	89.1	317,876	5.0%	2.5%	1.0%	15,900	8,000	3,200
Basketball	25%	3,401	16.1	54,797	10.0%	5.0%	2.5%	5,500	2,700	1,400
Dance	21%	2,839	91.6	260,062	2.0%	1.0%	0.0%	5,200	2,600	-
Yoga/Tai Chi/Pilates	20%	2,675	66.9	178,926	5.0%	2.5%	1.0%	9,000	4,500	1,800
Rock Climbing	12%	1,618	n/a	n/a	50.0%	40.0%	30.0%	n/a	n/a	n/a
Volleyball	12%	1,618	21.7	35,104	2.0%	1.0%	0.0%	700	400	-
TOTAL VISITS								**185,700**	**133,200**	**93,100**

Sources: NSGA Sports Participation Survey, 2009, CPW Household Survey, 2009

Table 5-5. Facility Use Estimates – Scenario C (Low Participation)

Activity/Program	Percent of Survey Respondents Participating	Estimated Market Area Participants	Average Participation Days Per Year	Estimated Market Area Days Per Year	Capture Rate			Estimated Use		
					High	Medium	Low	High	Medium	Low
Exercise Walking	76%	6,287	103.5	650,975	1.0%	0.5%	0.0%	6,500	3,300	-
Swimming/Aquatics	27%	2,238	61.9	138,533	45.0%	40.0%	35.0%	62,300	55,400	48,500
Running/Jogging	40%	3,308	90.4	299,026	1.0%	0.5%	0.0%	3,000	1,500	-
Treadmill/Stair Machine	37%	3,045	63.7	193,865	5.0%	2.5%	1.0%	9,700	4,900	1,900
Weight Training	37%	3,045	52.8	160,859	5.0%	2.5%	1.0%	8,000	4,000	1,600
Aerobics	26%	2,140	89.1	190,726	5.0%	2.5%	1.0%	9,500	4,800	1,900
Basketball	25%	2,041	16.1	32,878	10.0%	5.0%	2.5%	3,300	1,600	800
Dance	21%	1,703	91.6	156,037	2.0%	1.0%	0.0%	3,100	1,600	-
Yoga/Tai Chi/Pilates	20%	1,605	66.9	107,355	5.0%	2.5%	1.0%	5,300	2,700	1,100
Rock Climbing	12%	971	n/a	n/a	50.0%	40.0%	30.0%	n/a	n/a	n/a
Volleyball	12%	971	21.7	21,062	2.0%	1.0%	0.0%	400	200	-
TOTAL VISITS								**111,100**	**80,000**	**55,800**

Sources: NSGA Sports Participation Survey, 2009, CPW Household Survey, 2009

As a cross-check on the use estimates presented above, we estimated use based on attendance at comparable facilities. Use at other facilities we reviewed ranged from 3 to 16 visits per person in the market area. Table 5.6 shows estimates based on various visitation assumptions for each of the three market area population scenarios. Note that the central values in Table 5.6 are similar to the central ranges presented in Tables 5.3 – 5.5.

Table 5-6. Annual Use Estimates Based on Attendance at Comparable Facilities

	Estimated Annual Attendance		
Annual Days Per Person	**Scenario A (High)**	**Scenario B (Medium)**	**Scenario C (Low)**
2	40,049	29,078	18,106
4	80,099	58,156	36,212
6	120,148	87,234	54,317
8	160,197	116,312	72,423
10	200,246	145,390	90,529
12	240,296	174,468	108,635
14	280,345	203,545	126,740
16	320,394	232,623	144,846

Source: CPW, 2009

REVENUE ESTIMATES

Determining the appropriate fee structure is an important component of facility management. Market forces, the supply of competing facilities, and a number of other factors influence community center fees. Additionally, fees follow basic principles of supply and demand and can influence use. A community center should have a fee structure that allows access for all members of the community, regardless of economic status. Therefore, the key issue to consider while developing a fee structure is how to keep the facility affordable while still recovering a significant percentage of operating and maintenance costs.

CPW reviewed a variety of data sources to assess potential fee structures for the proposed community center. The CPW household survey specifically asked respondents to indicate how much they were willing to pay to use the facility. CPW also collected detailed fee structures from comparable facilities. These are presented in Appendix E.

Table 5.6 shows a comparison of comparable drop-in fees compared to the survey average of willingness to pay. Respondents from the Canby community survey indicated that they would pay an average of $5 per visit, which is slightly more that the average fees of similar facilities, yet consistent enough to demonstrate the similarity between comparable facility fees and market information provided by the survey respondents.

Table 5-7. Drop-in Fee Comparisons, Comparables & Survey Data

User Type	Average		Range
Toddlers	$	-	$0.00 - $0.00
Children	$	3.60	$1.75 - $6.00
Teens	$	5.50	$1.75 - $12.00
Adults	$	7.00	$3.50 - $12.00
Seniors	$	5.80	$3.25 - $12.00
Average	**$**	**4.38**	
Survey Average	**$**	**5.00**	

Sources: CPW Household Survey, 2009

This similarity is also observed when analyzing the fee structures of annual memberships compared to survey data. Table 5.8 shows that at the facilities we studied, individual memberships cost $318 on average. Data collected from the Canby community survey indicates that respondents are willing to pay $300 a month for an annual membership at the proposed facility.

Table 5-8. Annual Membership Fee Comparisons, Comparables & Survey Data

User Type	Average		Range
Toddlers	$	-	$0.00 - $0.00
Children	$	226.80	$152.00 - 245.00
Teens	$	292.00	$152.00 - $378.00
Adults	$	422.80	$217.00 - $540.00
Seniors	$	332.00	$173.00 - $468.00
Average	**$**	**318.40**	
Survey Average	**$**	**300.00**	

Sources: CPW Household Survey, 2009, CPW, 2009

While memberships and drop-in fees make up a large percentage of community center revenue, there are a number of other revenue sources that must be considered. These include program fees, concessions, facility rentals, and charges for amenities like towels and lockers. Based on our research of comparable facilities, we found that the average revenue generation per visit was approximately $5.50. To account for economies of scale, this figure was adjusted by roughly 10% for each scenario to create a range of $5 - $6 per visit.

Applying the revenue per visit data to our visitation estimates yield a low revenue estimate of about $400,000 (based on about 80,000 visits), a medium estimate of about $740,000 (based on about 135,000 visits), and a high estimate of about $1,140,000 (based on about 190,000 visits).

Operating and Maintenance Costs

Table 5.9 shows average operating and maintenance (O & M) costs at comparable facilities[5]. O & M costs at comparable facilities averaged approximately $1.2 million annually. The highest category

[5] Certain facilities discussed in the Appendix D Comparables were omitted from this analysis due to insufficient budget data.

of operating and maintenance costs was personal services followed by utilities, which accounted for nearly 16% of total O & M costs.

Table 5-9. O & M Costs of Select Comparable Facilities

Category	Amount	Percent of Total
Personal Services	$ 735,610	60%
Supplies	$ 38,659	3%
Purchased Services	$ 71,139	6%
Marketing/Public Relations	$ 14,549	1%
Utilities	$ 201,731	16%
Capital Costs	$ 77,659	6%
Maintenance/Repairs	$ 65,068	5%
Other Expenses	$ 27,004	2%
Total Expenses	**$1,231,417**	**100%**

Source: CPW, 2009

Based on our research of comparable facilities, we found that the average revenue generation per visit was approximately $9.00. To account for economies of scale, this figure was adjusted by roughly 20% for each scenario to create a range of $7 - $11 per visit.

Applying the expense per visit data to our visitation estimates yield a low expense estimate of about $900,000 (based on about 80,000 visits) and a high estimate of about $1.3 million (based on about 190,000 visits). Our average visitation estimate of 135,000 yields total O & M costs of $1.2 million and personal expenses of around $730,000 (see Table 5.10).

Table 5-10. O & M Costs Based on Average Visitation Estimate

Expenses		
Personal Services	$	725,803
Supplies	$	38,144
Purchased Services	$	70,190
Marketing/Public Relations	$	14,355
Utilities	$	199,041
Other Expenses	$	167,467
Total Expenses	$	1,215,000
Expense/Visit	$	9.00
Expense/Sq. Ft.	$	24.30

Source: CPW, 2009

To better assess the validity of this data, CPW conducted a more rigorous analysis of the personal services section of O & M costs for a community center. Based on staff counts and current wage data provided by the Parks and Recreation Department of both the City of Eugene and the City of Portland, we were able to construct a model of possible wage and benefit totals for the proposed Canby community center (see Table 5.11).

Table 5-11. Potential Personnel Configuration – Canby Community Center

Administration

Staff Category	Salary	Benefits	Insurance	# of Staff	Total Cost
Director	$ 55,620	$ 28,980	$ 12,000	1	$ 96,600
Recreation Programmer	$ 46,100	$ 24,900	$ 12,000	1	$ 83,000
Programming Assistant	$ 35,600	$ 20,400	$ 12,000	1	$ 68,000
Activity Coordinator	$ 24,500	$ 10,500	$ -	2	$ 70,000
Office Coordinator	$ 34,200	$ 19,800	$ 12,000	1	$ 66,000
TOTAL				**6**	**$ 383,600**

Temporary & Part Time

Staff Category	Hourly Rate	Annual Hours	# of Staff	FTE	Total Cost
Temp Activity Coordinator	$ 9.50	1040	1	0.5	$ 9,880
Temp Office Coordinator	$ 10.53	1040	1	0.5	$ 10,946
Instructor - Level 1	$ 9.50	1040	15	7.5	$ 148,200
Instructor - Level 2	$ 10.53	1040	10	5	$ 109,460
Instructor - Level 3	$ 13.55	1040	5	2.5	$ 70,460
TOTAL		**5200**	**32**	**16**	**$ 348,946**
GRAND TOTAL				**22**	**$ 732,546**

Sources: City of Eugene, 2009, City of Portland, 2009, CPW, 2009

This model was based on staff counts and administrative structures at comparable facilities, and it is important to note that facility managers will determine actual staff configurations. This model shows that with a staff of 6 full-time administrative employees and the 32 part-time workers (16 FTE), personal services make up around $730,000 of total O & M costs.

Preliminary Feasibility and Cost Recovery

One of the primary objectives of this report is to develop preliminary cost and revenue estimates for the proposed Canby Community Center. Recognizing several uncertainties in this analysis, we developed high, medium, and low estimates of revenues and expenses.

The operating and maintenance costs and revenues presented in this section are based on the preliminary facility concept described in Chapter II, the CPW household survey results, and information collected from comparable facilities. Because we are not reviewing a specific facility on a specific site, the cost and revenue estimates should be considered preliminary.

Table 5.12 shows the preliminary cost and revenue estimates. The estimates are based on three primary inputs: visitation, revenue per visit, and cost per visit. The visitation estimates are based on the figures presented in Tables 5.3 to 5.5. Revenue per visit estimates are based on a review of revenues at comparable facilities and information collected from the household survey. The cost per visit and the expenditure breakdowns are based on comparable facilities.

In the absence of detailed revenue breakdowns from the comparable facilities studied for this report, CPW used revenue ratios developed from a previous study of 10 community centers in Colorado (CPW, 1998). The precise distribution of revenues will vary, and these figures are provided as rough estimates.

One of the key assumptions built into the scenario in Table 5.12 is economy of scale. To reflect economies of scale for the facility we assumed that as visitation increases, revenue per visit

increases and cost per visit decreases. Note that expense per visit fluctuates more than revenue per visit due to the relatively inelastic nature of community center costs.

The scenarios suggest that the facility will achieve a cost recovery ratio of between 45% and 86%. This is consistent with comparable facilities examined for this report. The annual revenue shortfall would be between roughly $200,000 and $500,000. The median participation scenario shows a budget shortfall of $470,000 and cost recovery of 61%. Cost recovery for comparable facilities we analyzed for this project ranged from 40 percent to 60 percent.

Table 5-12. Preliminary Feasibility and Cost Recovery Analysis

Category	Scenario C (Low Participation)	Scenario B (Medium Participation)	Scenario A (High Participation)
Inputs			
Visitation	80,000	135,000	190,000
Revenue Per Visit	$ 5.00	$ 5.50	$ 6.00
Cost Per Visit	$ 11.00	$ 9.00	$ 7.00
Revenues			
Member Fees	$ 161,954	$ 300,628	$ 461,570
Daily Admissions	$ 109,296	$ 202,880	$ 311,492
Other Activities/Programs	$ 91,583	$ 170,001	$ 261,011
Facility Rental	$ 6,660	$ 12,363	$ 18,982
Equipment Rental	$ 11,834	$ 21,967	$ 33,727
Concessions	$ 5,384	$ 9,995	$ 15,345
Other Revenue	$ 13,288	$ 24,667	$ 37,872
Total Revenues	**$ 400,000**	**$ 742,500**	**$ 1,140,000**
Expenses			
Personal Services	$ 525,684	$ 725,803	$ 794,500
Supplies	$ 27,627	$ 38,144	$ 41,754
Purchased Services	$ 50,837	$ 70,190	$ 76,834
Marketing/Public Relations	$ 10,397	$ 14,355	$ 15,714
Utilities	$ 144,161	$ 199,041	$ 217,880
Other Expenses	$ 121,293	$ 167,467	$ 183,318
Total Expenses	**$ 880,000**	**$ 1,215,000**	**$ 1,330,000**
Financial Indicators			
Profit (Loss)	(480,000)	(472,500)	(190,000)
Cost Recovery	45%	61%	86%

Source: CPW, 2009

FINANCIAL RISK FACTORS

As with any project of this scale, there is a great deal of risk with respect to construction, operation and maintenance. The results of our preliminary feasibility analysis suggest that costs are likely to exceed revenues by between 14 and 55 percent. This is typical for facilities such as the proposed community center.

Based on our research, we identified several areas that have potential financial risk. These are discussed in more detail below:

Facility Design and Construction Costs

CAPRD should design the facility with functionality in mind. The building design has a significant impact on facility costs. Review of comparables suggests that construction costs for a 50,000 square foot facility for between $225 and $275 per square foot. Costs above that level suggest that the facility may have design elements that are not cost effective.

Fee Structures

Fees follow basic rules of supply and demand. Selecting an appropriate fee structure will impact both use and revenues. Fees that are too high will tend to discourage facility use and facility revenues. Fees that are too low will reduce revenues and increase the amount of subsidy needed to break even. Fees should be structured to accommodate the broad range of expected users.

Facility Staffing

Our analysis indicates that personnel expenses are typically the largest single expense category for this type of facility. An overstaffed facility will lead to unnecessary costs. Conversely, an understaffed facility will be poorly maintained and supervised and may lack programs users consider essential and may discourage use.

Facility Maintenance

Survey respondents clearly indicated that a well-maintained and managed facility was essential to their use decisions. Thus, the facility should be kept clean and equipment should be maintained as needed.

SUMMARY

We estimate the facility will average between 80,000 and 190,000 visits annually during the first five years of operation. These estimates are based on the preliminary design program detailed in Chapter II, and the assumption that the proposed facility is well managed and adequately maintained.

Our preliminary feasibility assessment suggests that the facility will not break even on operating and maintenance costs (this does not include construction or other capital costs). The three scenarios developed for this analysis indicate O & M cost recoveries of between 45% and 86%.

CHAPTER 6: CONCLUSIONS AND RECOMMENDATIONS

This chapter summarizes our key findings and presents facility-related recommendations that can help assist the City of Canby, CAPRD, and other community partners in achieving its goal of developing a community center in the Canby area.

SUMMARY OF KEY FINDINGS

In this section we review the results of our analysis with respect to the initial facility concept proposed in Chapter II. The results of our research suggest that the initial scoping meetings held with community stakeholders in 2008 gauged community needs with a high degree of accuracy. This is not surprising—the stakeholders included a wide cross-section of local interests. Below is a summary of key findings from our research:

Facility Emphasis

The stakeholder group initially identified the facility as youth and family-oriented. The survey and demographic data reinforce that objective. However, survey results also suggest that respondents desire a broad range of activities that engage people of all ages.

The survey data indicate that the aquatic center is the most important component of the facility. This is not surprising, the market area has limited aquatic facilities that are available to the general public, and the primary facility, Canby Swim Center, is scheduled to close.

In addition, survey respondents indicated a strong preference for the facility to include non-athletic activities and spaces. Multi-purpose space was ranked the second most important component of the facility.

Target Populations

Several demographic trends are relevant to the proposed facility. First, population has grown and is expected to continue to grow over the next ten years. Other things being equal, increased population equates to a larger base market and increased facility use.

Analysis of Canby's demographics shows a large increase in the population of residents 50 and older. At the county level, this segment of the population is expected to increase rapidly in the next ten years. As Canby's population continues to age, it will be important to provide offer programs that are accessible to all activity levels.

The population of youth in the Canby School District has grown at a steady rate in past years. The population of youth aged 10 – 17 years has increased approximately 20% between 1990 and 2000. We expect updated 2010 Census data will confirm that this trend has continued in recent years. A growing youth population has implications for program offerings as well as demand.

Income level should also be considered when designing a facility to be accessible to all. Our research indicates that Canby has a higher percentage of low income residents compared to Clackamas County. Developing a fee structure that allows access for low-income members of the community will ensure that price is not a barrier for some.

Market Trends

Local survey results indicate that sports participation patterns in the market area are generally similar to statewide patterns. Many of the activities proposed at the community center are moderate-growth activities, and many are high-participation activities both in terms of the number of participants and the frequency of participation.

Emerging exercise activities like Yoga and Tai Chi appear to be popular in the Canby area. These programs are beneficial to the design programs because they can attract a steady flow of users—and program fees—yet do not require activity-specific capital expenditures.

Additionally, high growth activities like weightlifting, aerobic exercise, and exercising with equipment are compatible with the facility concept. Each of these activities experienced significant growth at the national level since 2006 (3% - 6%). High participation activities are also compatible with the proposed facility concept. Activities like exercising with equipment, swimming, and working out at a club draw approximately 1 million Oregonians annually.

Emerging exercise activities like Yoga and Tai Chi appear to be popular in the Canby area. These programs are beneficial to the design programs because they can attract a steady flow of program fees yet do not require activity-specific capital expenditures.

Local Inventory

The inventory of local facilities found only limited facilities available for community use in the market area. Moreover, no facilities contained the variety of activities the proposed Community Center could host.

The lack of comparable local facilities is beneficial to the proposed community center. The lack of facilities suggests that a community center that accommodates a range of uses would attract substantial use in the community..

Performance of Comparable Facilities

Several trends surfaced in our review of the comparable facilities. First, all of the facilities in similar sized markets included aquatic facilities, gymnasiums, and multi-purpose space. All of these components are a part of the proposed facility concept for the Canby Community Center.

Second, and perhaps more importantly, only one of the facilities experienced full cost recovery (Sherwood YMCA). In other words, it is common for similar facilities to not generate enough revenue to cover operating and maintenance costs. Cost recovery was generally 40 percent to 60 percent.

Preliminary Financial Analysis

Based on facility costs of between $275 and $325 per square foot, a 50,000 square foot facility will cost between $13.8 million and $16.3 million to design and build. This assumes that CAPRD will identify an appropriate site with easy access to services. A smaller facility would cost less.

We estimate the facility will average between 90,000 and 180,000 visits annually during the first five years of operation. These estimates are based on a well-managed and programmed facility.

Our preliminary feasibility assessment suggests the facility will not break even on operating and maintenance costs (this does not include construction or other capital costs). The three scenarios indicate O & M cost recoveries of between 45 percent and 86 percent.

RECOMMENDATIONS

The results of this study suggest that market demand in the Canby area can support a community center and sports field complex. Additionally, this facility may be financially feasible provided CAPRD can identify revenue sources to cover anticipated shortfalls and the cost of construction. However, considerable work remains before a local community center can become a reality.

Based on our evaluation, CPW recommends a facility of approximately 50,000 square feet with the amenities described in the design program. We do not recommend phasing development of the facility—the relative additional costs of building the non-aquatic portions of the facility are not conducive to a phased development program. The survey results suggest strong support for both the aquatic and other elements of a community center.

Moreover, it complicates the process of financing the facility. If the region chooses to fund a portion of the facility with a bond measure, there is a possibility that a phased approach would result in failure of future project phases. In short, we recommend the stakeholders work to communicate how the full community center meets the broad range identified community needs—not just those of swimmers.

Following are some recommended next steps that CAPRD should implement to assist in the completion of this project. Note that the recommendations do not reflect any specific priority or schedule.

Develop a Concise Project Plan and Schedule

The project stakeholders should establish a committee to develop a project plan and schedule covering the period between completion of the feasibility analysis and the facility opening. This should be completed in as much detail as possible and should identify critical tasks and the timing of each step. The schedule should be realistic, but should not allow too much time to complete tasks which can result in a loss of momentum for the organization.

Develop Conceptual Rendering

The conceptual plan presented in this report is a verbal description of the facility. While the verbal description was a necessary step to complete the feasibility assessment, it is inadequate to communicate a vision to the community. A key next step will be to engage an architectural firm in developing a floor plan, a site plan, and exterior renderings of the facility. Some communities have used scale models to great effect.

Initiate Fundraising for Design and Engineering

One of the key next steps is to obtain funding for the design and engineering of the facility. A total of between $1.1 and $1.3 million will be required to develop the final plans.

Prepare a Request for Proposals (RFP) for Design and Engineering of the Facility

Preparation of the RFP for this phase of the project can and should be completed prior to obtaining full funding. This will determine (1) how much money is needed for the design and engineering phase; and (2) what the specific scope of this phase is.

Consider Hiring a Fundraising Professional
CAPRD will need to raise between $13.8 million and $16.3 million to develop the proposed community center. Based on market area demographics, it is unlikely that the entire amount can be raised through local funds. A fundraising professional can develop a comprehensive fundraising plan and should have insights into funding alternatives.

Establish a Fundraising Committee Comprised of a Broad Cross-Section of the Local Community
One portion of the project should be a local capital campaign, however small. Local support will be essential in identifying and securing external funding. This campaign should be overseen by a fundraising committee comprised of a broad cross-section of community representatives.

Identify a Preferred Site (or Sites) for the Facility.
This should be completed before the RFP for design and engineering is distributed. The site selected should be consistent with the site guidelines described in Chapter II. A key step will be to conduct an inventory of suitable sites and develop site rating criteria prior to final site selection.

Develop a Funding Mechanism to Cover Operating and Maintenance Costs
Our preliminary feasibility analysis suggests the facility will operate at a deficit of between $200,000 and $500,000. The administrative organization—probably the Canby Area Park and Recreation District—will need to identify an appropriate tax to cover this shortfall, and will need to plan when this bond measure is put to a vote by the community.

Conduct Focus Groups with Potential Users to Further Refine Facility Design Priorities
The more input the Canby community has in the design process, the better the facility will serve the needs of the population. This step should be included as a part of the design and engineering work program. Additional user surveys could also be included as a part of the work program.

Use the Survey Results to Develop Preliminary Programming for the Facility
The results of the Canby community survey provide a detailed baseline of data that CAPRD can use to develop preliminary programming with. This data, combined with focus groups and information from other local recreation providers can establish a solid foundation for the types of programs that local residents would use the facility for.

Continue Working with a Broad Coalition of Local Groups
CAPRD has established a broad base of support in the community and represents a variety of community interests. As the group progresses through the next stages of this project, it should continue working with Canby Kids, the YMCA, the Canby School District, and other interested parties to help ensure the vision of developing a local community center.

Design and Site the Facility in a Way that Accommodates Future Expansion
The use estimates presented in this report represent a relatively conservative scenario and with the exception of aquatic activities, fall well within the 3 percent to 15 percent capture rates the YMCA uses as typical guidelines. Use at the high end of this range would have the facility operating beyond capacity. The community center should be designed and sited to grow with the community.

APPENDIX A: DEMOGRAPHIC AND SOCIOECONOMIC INDICATORS

This appendix presents demographic indicators including population, employment, income, education, and school enrollment for Clackamas County and/or the Canby School District. It focuses on market area characteristics in the City of Canby, the Canby Area Parks and Recreation District (CAPRD) boundary, and a secondary market area. Demographic indicators help to assess potential user demand. To complete this analysis, CPW used data from the U.S. Census, Oregon Employment Division, Center for Population Research and Census at and the Portland State University.

POPULATION

Table A-1 shows population growth between 2000 and 2008 for Oregon, Clackamas County, and the City of Canby. The data indicate that Clackamas County grew at an average annual rate of 1.3 percent during this period—slightly faster than the state as a whole. The City grew at a rate of 2 percent during this period, the largest average annual growth among the three.

Table A-1. Population Trends, Oregon, Clackamas County, and City of Canby, 2000-2008

Area	1990	2000	2008	1990-2008 Change	1990-2008 % Change	1990-2008 AAGR	2000-2008 AAGR
Oregon	2,842,321	3,436,750	3,791,075	354,325	10.31%	1.92%	1.23%
Clackamas County	278,850	340,000	376,660	36,660	10.78%	2.00%	1.29%
City of Canby	8,990	12,910	15,165	2,255	17.47%	3.69%	2.03%
City of Molalla	3,637	5,710	7,590	1,880	32.92%	4.61%	3.62%
City of Barlow	118	140	140	0	0.00%	1.72%	0.00%
City of Oregon City	14,698	26,200	30,405	4,205	16.05%	5.95%	1.88%
Clacksmas Co. Unincorporated	160,123	176,290	178,176	1,886	1.07%	0.97%	0.13%
City of Wilsonville*	7,106	13,991	17,940	3,949	28.23%	7.01%	3.16%
City of Aurora	587	660	970	310	46.97%	1.18%	4.93%
City of Hubbard	1,881	2,500	3,125	625	25.00%	2.89%	2.83%
City of Donald	316	620	1,025	405	65.32%	6.97%	6.49%
Canby School District	23,309	27,431	n/a	n/a	n/a	1.64%	n/a

* Portion of the City within Clackamas Co.

Source: 2007 Oregon Population Report Table 4. Population Estimates for Oregon and Its Counties and Incorporated Cities: April 1, 1990-Jly 1, 2007: Center for Population Research and Census, Portland State University

Table A-2 shows population trends and projections for Oregon and Clackamas County between 2000 and 2040. The data indicate that Oregon will continue to grow until 2020, however, the average annual growth rate will start to slow down after 2020, and continues to decline into 2040. The average annual growth rate for Clackamas County remains constant throughout the projection. Factoring the current decline in housing market, the annual growth rate may start to decline before 2020.

Table A-2. Population Trends and Projections Oregon and Clackamas County, 2000-2040

	Oregon		Clackamas County	
Year	**Population**	**AAGR**	**Population**	**AAGR**
2000	3,436,750	n/a	340,000	n/a
2010	3,843,900	1.2%	391,536	1.5%
2020	4,359,258	1.3%	460,323	1.6%
2030	4,891,225	1.1%	536,123	1.5%
2040	5,425,408	1.0%	620,703	1.5%

Source: Forecasts of Oregon's County Populations and Components of Change, 2000-2040 Office of Economic Analysis, DAS

Table A-3 shows the components of population change in Clackamas County between 2000 and 2040. A couple of important trends are evident in these numbers. First, Clackamas County's population is forecast to grow by over 280,000 – an 82.6% increase between 2000 and 2040. Second, net migration has been and will continue to be a major component of population change in Clackamas County, with an estimate that migration will account for 70.8% of total population growth between 2000 and 2040.

Table A-3. Components of Clackamas County Population Change, 2000-2040

Period	Births	Deaths	Natural Increase	Net Migration	Net Migration %	Total Change	Percent Change	AAGR
2000-2005	20,738	13,298	7,440	15,800	68.0%	23,240	6.84%	1.33%
2005-2010	23,153	14,466	8,687	19,609	69.3%	28,296	7.79%	1.51%
2010-2015	26,528	15,582	10,947	22,165	66.9%	33,112	8.46%	1.64%
2015-2020	29,092	16,924	12,168	23,507	65.9%	35,675	8.40%	1.63%
2020-2025	30,438	18,687	11,752	25,851	68.7%	37,603	8.17%	1.58%
2025-2030	31,431	20,969	10,462	27,736	72.6%	38,198	7.67%	1.49%
2030-2035	33,281	23,520	9,760	30,348	75.7%	40,108	7.48%	1.45%
2035-2040	36,380	25,617	10,763	33,709	75.8%	44,472	7.72%	1.50%
TOTAL	**231,041**	**149,062**	**81,979**	**198,725**	**70.8%**	**280,703**	**82.6%**	**1.52%**

Source U.S. Census, Center for Population Research and Census, Portland State University.

Table A-4 presents population data for the Canby School District. The most recent data that exists is from the 2000 Census. The data provide more focused population figures for the primary market area of the proposed facility. The primary market area—Canby School District —contained about 27,400 individuals in 2000. The City of Canby grew faster than the Canby School District and Clackamas County between 1990 and 2000.

Table A-4. Population Trends, Canby School District

Population	Canby School District	Canby	Clackamas County
2008	N/A	15,165	376,660
2000 Census	27,431	12,910	340,000
1990 Census	23,309	8,990	278,850
AAGR 1990-2000	1.64%	3.69%	2.00%
AAGR 2000-2008	N/A	1.62%	1.03%

Source: U.S. Census, Oregon Prospector

Table A-5 shows population by age in 1990 and 2000 for the Canby School District. Most age groups are growing in population, some as much as 72 – 83% (ages 50-54 and ages 85 and over, respectively). Other large increases are for ages 55-59, 75-79, and 80-84. This shows an increasingly aging population in Canby, especially noting that there have been negative or low growth trends for younger age groups, especially those between 18 and 40.

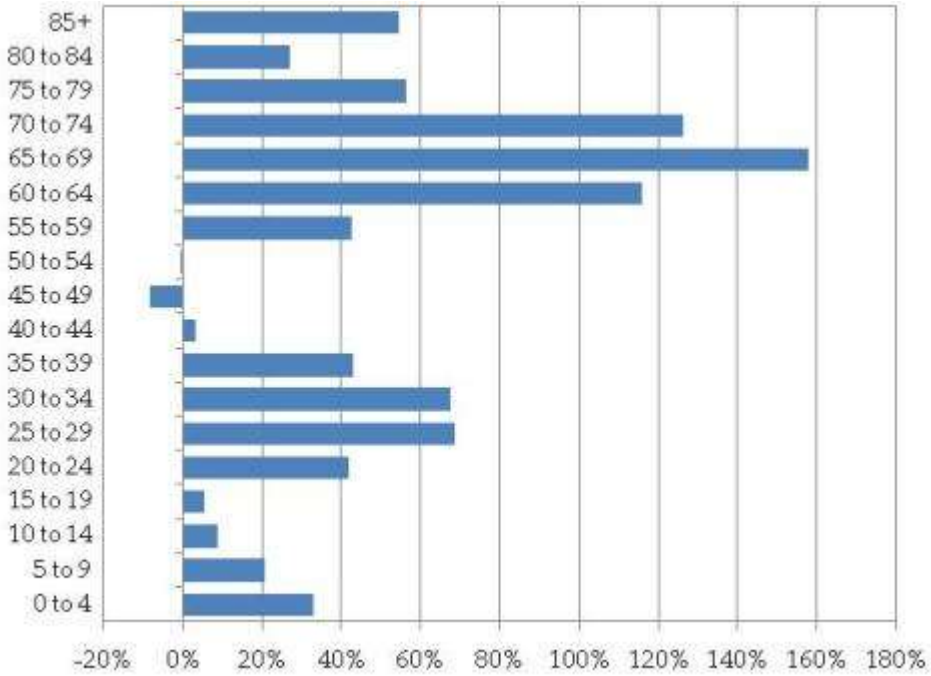
Table A-5. Population by Age Category, Canby School District, 1990-2000

Age	1990	2000	Change	Percent Change	AAGR
Under Age 5	1,596	1,764	168	11%	1.01%
Age 5 to 9	1,768	2,012	244	14%	1.30%
Age 10 to 14	1,836	2,251	415	23%	2.06%
Age 15 to 17	1,090	1,347	257	24%	2.14%
Age 18 to 19	662	646	-16	-2%	-0.24%
Age 20 to 24	1,233	1,307	74	6%	0.58%
Age 25 to 29	1,423	1,340	-83	-6%	-0.60%
Age 30 to 34	1,724	1,650	-74	-4%	-0.44%
Age 35 to 39	1,942	2,002	60	3%	0.30%
Age 40 to 44	1,907	2,134	227	12%	1.13%
Age 45 to 49	1,665	2,098	433	26%	2.34%
Age 50 to 54	1,178	2,026	848	72%	5.57%
Age 55 to 59	1,003	1,648	645	64%	5.09%
Age 60 to 64	1,071	1,168	97	9%	0.87%
Age 65 to 69	1,110	976	-134	-12%	-1.28%
Age 70 to 74	827	993	166	20%	1.85%
Age 75 to 79	605	933	328	54%	4.43%
Age 80 to 84	389	593	204	52%	4.31%
Age 85 +	280	513	233	83%	6.24%
TOTAL	**23,309**	**27,401**	**4,092**	**18%**	**1.63%**

Source: 2009 Canby School District Demographic Report

Figure A-1 shows population change for Clackamas County between 2000 and 2020 by age group. Several groups are forecast to experience substantial changes. People from 65 to 69 are expected to increase by the most (almost 160 percent), while people between 45 and 54 are expected to decline by as much as 10%. It is apparent that older citizens of Clackamas County will experience significant growth, while younger people are not growing as quickly.

Figure A-1 – Projected Population Change, Clackamas County, 2000 to 2020



Source: Oregon Office of Economic Analysis, 2009

EMPLOYMENT

According to a demographic study conducted by the Portland State Population Research Center, most residents within the Canby School District commute outside of Canby to work. Therefore, Canby's population growth largely depends on the changes of metro area's economy.

Employment is an important factor in population growth and will affect the long-term demand for a community center. Table A-7 shows labor force participation in 2008 and projected for 2013 in Canby and Clackamas County. The data show that the unemployment rate is slightly lower in Canby than it is in Clackamas County, which is interesting given the larger income of Clackamas County residents. However, both areas have a lower unemployment rate compared to the state of Oregon, which as of June 2008 was 5.9% but has increased to the second highest unemployment rate in the nation, 12.2%, in June 2009. It is likely that the projections did not take the current economic downturn into account.

Table A-7. Labor Force Participation and Unemployment, Canby and Clackamas County, 2008

	2008		2013	
	Canby	**Clackamas County**	**Canby**	**Clackamas County**
Total Labor Force	7,981	211,185	8,715	228,069
Employed	7,598 (95.2%)	199,478 (94.5%)	8,298 (95.2%)	215,383 (94.5%)
Unemployed	377 (4.7%)	11,353 (5.4%)	410 (4.7%)	12,303 (5.4%)

Source: Oregon Prospector, 2009

Table A-8 shows the change in employment by industry between 2008 and 2009 for Clackamas County. Trade, transportation, and utilities employ the most people in Clackamas County, with government, manufacturing and education and health services high employers as well. The only industry to gain jobs in this time period has been education and health services, which contradicts the decrease in student enrollment in the Canby School District.

Table A-8. Employment by Industry, Clackamas County, 2008-2009

	June 2009	June 2008	Percent Change
Total Nonfarm Employment	140,600	150,000	-6.30%
Mining and Logging	200	200	0.00%
Construction	9,600	11,800	-18.60%
Manufacturing	17,100	18,700	-8.60%
Trade, Transportation, and Utilities	31,400	33,300	-5.70%
Information	1,900	2,100	-9.50%
Financial Activities	9,100	9,900	-8.10%
Professional and Business Services	16,000	17,400	-8.00%
Education and Health Services	18,000	17,900	0.60%
Leisure and Hospitality	13,600	14,400	-5.60%
Other Services	5,200	5,300	-1.90%
Federal Government	1,400	1,400	0.00%
State Government	2,200	2,200	0.00%
Local Government	14,900	15,400	-3.20%

Source: Oregon Employment Department, 2009

Table A-10 shows covered employment in Clackamas County for the period between 2001 and 2008. The data indicate that employment in Clackamas County has grown at a rate slightly higher than population. Between 2001 and 2008, covered employment grew at an annual rate of 1.7 percent, while population grew at an annual rate of 1.4 percent. It is unclear as to what the economic recession will do to the average annual growth rate.

Table A-10. Clackamas County Covered Employment, 2001-2008

Industry	2001	2002	2003	2004	2005	2006	2007	2008*	AAGR
Natural Resources & Mining	4,167	4,364	4,530	4,904	4,770	4,812	5,018	6,029	5.4%
Construction	9,324	9,155	8,996	9,450	10,434	11,789	12,401	11,930	3.6%
Manufacturing	18,187	18,134	17,332	17,883	17,996	18,326	18,222	18,638	0.4%
Trade, Transportation & Utilities	32,471	31,463	30,535	31,804	33,219	33,324	33,574	33,321	0.4%
Information	1,725	1,647	1,502	1,596	1,544	1,678	1,986	2,070	2.6%
Financial Activities	8,302	8,158	8,477	8,404	9,012	9,013	8,314	7,836	-0.8%
Professional & Business Services	13,283	13,378	12,560	14,592	15,451	16,332	17,310	17,492	4.0%
Education & Health Services	13,022	14,159	14,761	15,304	15,696	16,205	16,382	17,641	4.4%
Leisure & Hospitality	11,516	11,793	11,718	12,383	12,646	13,036	13,916	14,554	3.4%
Other Services	5,426	5,444	5,277	5,536	5,664	5,589	5,749	5,550	0.3%
Private Non-Classified	79	83	86	54	64	67	79	79	0.0%
Federal Government	2,005	2,045	1,867	1,284	1,254	1,282	1,288	1,405	-5.0%
State Government	1,095	1,051	1,033	1,505	2,630	2,165	2,162	2,235	10.7%
Local Government	13,398	13,085	12,839	13,075	13,244	13,394	13,857	12,109	-1.4%
Total	134,000	133,959	131,513	137,774	143,624	147,012	150,258	150,889	1.7%

Source: *Covered Employment & Payrolls*, Oregon Employment Department. 2009

INCOME

Table A-11 shows per capita personal income for the period between 2000 and 2006 in Clackamas County. The data show that Clackamas County has historically had a higher per capita income than the state as a whole. However, the data suggest that this trend may be declining—per capita income as a percentage of state income decreased from 130% percent in 2001 to 124% in 2006. The reasons for this trend may be due to higher average annual growth rate of Oregon compared to the growth rate of the County. Per capita income of Oregon grew at an average annual rate of 4.7%, while Clackamas County only grew by 3.9% are unclear. The annual growth rate reinforces this finding: per capita income of Oregon grew at an average annual rate of 4.7 percent, while Polk County grew at the lower annual rate of 3.9 percent.

Table A-11. Per Capita Personal Income, 2000-2006

Year	Oregon	Clackamas County	Percent of Oregon
2000	28,096	36,568	130%
2001	28,518	35,658	125%
2002	28,931	35,316	122%
2003	29,565	35,973	122%
2004	30,621	37,631	123%
2005	31,599	39,116	124%
2006	33,299	41,378	124%
AAGR	4.7%	3.9%	83%

Source: Oregon County Economic Indicators, Oregon Employment Department

Table A-12 shows total household income for Canby and Clackamas County in 2008 and projected for 2013. The data indicate that Canby has a higher percentage of residents in the lower income brackets. 32.8% of households in Canby make less than $50,000 a year, whereas only 27% of all Clackamas County residents are in the same income bracket. (Note: The most recently available income data for the Canby School District is from the 2000 Census.)

Table A-12. Total Household Income, Canby and Clackamas County, 2008 - 2013

	2008		2013	
	Canby	**Clackamas County**	**Canby**	**Clackamas County**
Under $10,000	4.0%	3.9%	3.5%	3.5%
$10,000 - $19,999	8.4%	6.1%	7.6%	5.3%
$20,000 - $29,999	9.4%	7.7%	8.5%	6.5%
$30,000 - $39,999	11.0%	9.3%	10.2%	8.0%
$40,000 - $49,999	9.9%	9.5%	7.9%	8.4%
$50,000 - $59,999	12.6%	9.4%	13.5%	9.7%
$60,000 - $74,999	11.6%	11.6%	10.6%	10.4%
$75,000 - $100,000	13.4%	14.2%	13.5%	14.3%
Over $100,000	19.8%	28.4%	24.8%	33.8%

Source: Oregon Prospector, 2009

EDUCATION

Table A-13 shows K-12 school enrollment in the Canby School District. The enrollment in the Canby School District decreased by 107 between the 2007-2008 and 2008-2009 school years, with a slight increase in middle school enrollment and decreases in elementary and high school enrollments. Total enrollment decreased by about two percent between the two years.

Table A-13. Canby School District Enrollment, Change by School Year

Grades	2007-2008	2008-2009	Change	Percent Change
Grades K - 5	2,273	2,173	-100	-4.40%
Grades 6 - 8	1,148	1,169	21	1.83%
Grades 9 - 12	1,693	1,665	-28	-1.65%
Total Enrollment	**5,114**	**5,007**	**-107**	**-2.09%**

Source: Oregon Department of Education

Table A-14 shows educational attainment for the Canby School District and Clackamas County for residents age 25 and over. The Canby School District has slightly lower numbers of residents with high school degrees and higher and bachelor's degrees and higher compared to residents of Clackamas County. The largest difference between the two is among residents with a 9th grade education or below, which is five percent higher in the Canby School District compared to Clackamas County.

Table A-14. Educational Attainment for Residents over Age 25, 2007

	Canby School District		Clackamas County	
Category	**Number**	**Percent**	**Number**	**Percent**
< Grade 9	1,624	7.48%	7,150	2.82%
Grade 9-12	1,264	5.82%	16,419	6.48%
High School	6,128	28.23%	64,248	25.35%
Some College	5,633	25.95%	68,409	26.99%
Associate's Degree	1,434	6.61%	18,944	7.47%
Bachelor's Degree	4,050	18.66%	51,121	20.17%
Graduate Degree	1,572	7.24%	27,201	10.73%
Total	**21,705**	**100%**	**253,492**	**100%**
High school graduate or higher	18,817	86.69%	229,923	90.70%
Bachelor's degree or higher	5,622	25.90%	78,322	30.90%

Source: American Community Survey 3-year Estimates, U.S. Census Bureau

APPENDIX B: SPORTS PARTICIPATION TRENDS

This appendix presents participation levels for a variety of sports that could be accommodated by the proposed community center and sports field complex. Participation levels help to indicate potential use demands. This data was obtained from the 2008 market research conducted by National Sporting Goods Association (NSGA).

METHODS

The sports participation data described in this appendix are for the following activities:

- Aerobic exercising
- Baseball
- Basketball
- Exercise with equipment
- Exercise walking
- Football
- Running and jogging
- Soccer
- Softball
- Swimming
- Volleyball
- Weightlifting
- Yoga

Varying levels of information were available for each of the above sports. National and state levels of participation were obtained from the National Sporting Goods Association (NSGA). The NSGA performs an annual household survey to assess athletics participation. Whenever possible, this appendix also presents data on the local level of participation.

SPORTS PARTICIPATION TRENDS

Table B-1 presents the national participation trends for some sports which could be offered at the proposed community center and sports field complex. The numbers represent individuals who participate in the given sport more than once during the given year. Exercise walking continues to have the highest level of total participation. Weight lifting and running/jogging exhibit the fastest annual growth rate. On the other hand, in-line skating demonstrated a sharp decline in participation from 2000. Basketball remains the leading steam sport by participation.

Table B-1. 1998-2008 National Sports Participation (in millions)

Activity	1998	2000	2002	2004	2006	2008	AAGR
Aerobic Exercising	25.8	26.7	29	29.5	33.7	36.2	3.4%
Baseball	15.9	15.6	15.6	15.9	14.6	15.2	-0.4%
Basketball	29.4	27.1	28.9	27.8	26.7	29.7	0.1%
Bicycle Riding	43.5	43.1	39.7	40.3	35.6	44.7	0.3%
Billiards/Pool	32.3	32.5	33.1	34.2	31.8	31.7	-0.2%
Bowling	40.1	43.1	42.4	43.8	44.8	49.5	2.1%
Camping	46.5	49.9	55.4	55.3	48.6	49.4	0.6%
Cheerleading	3.1	n/a	n/a	3.8	3.8	2.9	-0.7%
Dart Throwing	20.8	17.4	18.5	n/a	n/a	n/a	-2.9%
Exercise Walking	77.6	81.3	82.2	84.7	87.5	96.6	2.2%
Exercising with Equipment	46.1	44.8	46.8	52.2	52.4	63	3.2%
Football	8.1	8	7.8	8.6	10.1	10.5	2.6%
Inline Skating	27	21.8	18.8	11.7	10.5	9.3	-10.1%
Martial Arts	4.6	5.4	4.2	4.7	n/a	n/a	0.4%
Racquetball	4	3.2	n/a	n/a	4	n/a	0.0%
Running/Jogging	22.5	22.8	24.7	26.7	28.8	35.9	4.8%
Soccer	13.2	12.9	13.7	13.3	14	15.5	1.6%
Softball	15.6	14	13.6	12.5	12.4	12.8	-2.0%
Swimming	58.2	58.8	53.1	53.4	56.5	63.5	0.9%
Target Shooting	18.9	16.9	18.9	19.2	19.1	20.3	0.7%
Tennis	11.2	10	11	9.6	10.4	12.6	1.2%
Volleyball	14.8	12.3	11.5	11.8	11.1	12.2	-1.9%
Weight Lifting	n/a	22.8	25.1	26.2	32.9	37.5	6.4%
Workout at Club	26.5	24.1	28.9	31.8	34.9	39.3	4.0%
Wrestling	n/a	n/a	n/a	n/a	3.2	n/a	n/a
Yoga	n/a	n/a	n/a	n/a	n/a	16	n/a

Source: NSGA (all NSGA data does not include those under the age of 7)

Table B-2 presents Oregon's sports participation data for 2008. As seen in Table B-2, exercise walking is the exercise most participated in, followed by swimming and running/jogging in Oregon. Exercise/walking is also the most frequently participated in activity (once every three days on average), followed by exercising with equipment (once every four days on average). Running/jogging and aerobic exercise were also participated in on a consistent basis (both once every five days on average). Based on Table B-2, exercise activities listed below are participated in at least once a week on average in Oregon:

- Exercise walking
- Running/Jogging
- Aerobic exercising
- Exercising with equipment
- Volleyball

Table B-2. Oregon Sports Participation in 2008

Activity	Number of Participants (in thousands)	Average Participation Days per Person	Frequency (once every X days)
Exercise Walking	1,528	103.54	4
Exercising with Equipment	950	63.67	6
Swimming	736	61.89	6
Workout at a Club*	725	69.82	5
Aerobic Exercising	485	89.14	4
Running/Jogging	468	90.39	4
Weight Lifting	429	52.83	7
Yoga	394	66.90	5
Basketball	316	16.11	23
Baseball	183	60.00	6
Softball	131	62.80	6
Soccer	127	45.07	8
Volleyball	110	21.69	17
Football	74	42.70	9

Source: National Sporting Goods Association Sports Participation Report, 2009

* Participants for this activity may/may not have participated in other activities that are provided at a club (e.g., exercise with equipment or weightlifting).

Exercise Walking

Exercise walking is the most widely participated in activity in Oregon with over 1.5 million residents participating an average of once every four days in 2008. Table B-3 shows that among those who participated in exercise walking, over 39% participated frequently (more than 110 day per year) and the average annual participation days of total participants was about 104 days per person, which is the highest among all the sports activities summarized in this report.

Table B-3. 2008 Oregon Frequency of Exercise Walking Participation (In thousands)

Exercise Walking	Number	Percent of Total
Infrequent (6-24 days/year)	347	23%
Occasional (25-109 days/year)	586	38%
Frequent (110+ days/year)	594	39%
Total	1,528	100%
Average participation days per person	103.54	-
Frequency of participation	4	-
Total participation days	158,170	-

Source: National Sporting Goods Association Sports Participation Report, 2009

Swimming

In 2008, over 730,000 residents swam in Oregon and a quarter of them swam on a frequent basis (over 110 days per year). On average, participants swam about 62 days a year in 2008.

Table B-4. 2008 Oregon Frequency of Swimming Participation (In thousands)

Swimming	Number	Percent of Total
Infrequent (6-24 days/year)	429	58%
Occasional (25-109 days/year)	125	17%
Frequent (110+ days/year)	182	25%
Total	736	100%
Average participation days per person	61.89	-
Frequency of participation	6	-
Total participation days	45,566	-

Source: National Sporting Goods Association Sports Participation Report, 2009

Running and Jogging

Table B-5 shows that in 2008, more than 450,000 Oregonians ran or jogged for exercise. The average annual number of participation days was over 90 days, and a majority (70%) of runners and joggers participated 25 days or more a year.

Table B-5. 2008 Oregon Frequency of Running and Jogging Participation (In thousands)

Running & Jogging	Number	Percent of Total
Infrequent (6-24 days/year)	140	30%
Occasional (25-109 days/year)	176	38%
Frequent (110+ days/year)	151	32%
Total	467	100%
Average participation days per person	90.39	-
Frequency of participation	4	-
Total participation days	42,292	-

Source: National Sporting Goods Association Sports Participation Report, 2009

Soccer

Table B-6 shows that 127,000 Oregonians played soccer in 2008. The majority (57%) of participants played soccer on a frequent basis (more than 40 days a year) and participants played soccer an average of 45 days in 2008.

Table B-6. 2008 Oregon Frequency of Soccer Participation (In thousands)

Soccer	Number	Percent of Total
Infrequent (2-9 days/year)	20	16%
Occasional (10-39 days/year)	34	27%
Frequent (40+ days/year)	73	57%
Total	127	100%
Average participation days per person	45.07	-
Frequency of participation	8	-
Total participation days	5,734	-

Source: National Sporting Goods Association Sports Participation Report, 2009

Basketball

As shown in Table B-7, over 300,000 Oregonians participated in basketball in 2008. On average, basketball participants play once every 23 days (16 days a year). This is the lowest average of all sports and activities that were studied for this report. Following the national trend, however, basketball is the most widely participated team sport in Oregon. This implies that basketball draws a large number of participants, but that individuals that play basketball participate less often relative to other team sports.

Table B-7. 2008 Oregon Frequency of Basketball Participation (In thousands)

Basketball	Number	Percent of Total
Infrequent (2-9 days/year)	152	48%
Occasional (10-49 days/year)	116	37%
Frequent (50+ days/year)	47	15%
Total	315	100%
Average participation days per person	16.11	-
Frequency of participation	23	-
Total participation days	8,106	-

Source: National Sporting Goods Association Sports Participation Report, 2009

Aerobics Exercising

Table B-8 shows Oregon's aerobics participation for 2008. Around 480,000 people in Oregon engaged in aerobics exercise, and a majority (66%) of participants did so at least 25 days a year. On average, participants engaged in aerobic exercise 89 days a year, or about once every four days.

Table B-8. 2008 Oregon Frequency of Aerobics Participation (In thousands)

Aerobic Exercising	Number	Percent of Total
Infrequent (6-24 days/year)	175	36%
Occasional (25-109 days/year)	106	22%
Frequent (110+ days/year)	204	42%
Total	485	100%
Average participation days per person	89.14	-
Frequency of participation	4	-
Total participation days	43,267	-

Source: National Sporting Goods Association Sports Participation Report, 2009

Exercise with Equipment

Table B-9 shows participation information for exercise involving equipment (e.g., treadmills and elliptical machines) in Oregon. Exercising with equipment is the second most frequently participated in sports activity in Oregon after exercise walking. Participants exercise with equipment once every six days on average (64 days/year), and the majority of participants (69%) exercise with equipment at least 25 days a year.

Table B-9. 2008 Oregon Frequency of Exercise with Equipment Participation (In thousands)

Exercising with Equipment	Number	Percent of Total
Infrequent (6-24 days/year)	289	30%
Occasional (25-109 days/year)	498	52%
Frequent (110+ days/year)	163	17%
Total	950	100%
Average participation days per person	63.67	-
Frequency of participation	6	-
Total participation days	60,465	-

Source: National Sporting Goods Association Sports Participation Report, 2009

Weight Lifting

Table B-10 represents weight lifting participation trends in Oregon. In 2008, 429,000 people participated in weight lifting, and a majority (56%) of them participated infrequently.

Table B-10. 2008 Oregon Frequency of Weight Lifting Participation (In thousands)

Weightlifting	Number	Percent of Total
Infrequent (6-24 days/year)	242	56%
Occasional (25-109 days/year)	132	31%
Frequent (110+ days/year)	54	13%
Total	429	100%
Average participation days per person	52.83	-
Frequency of participation	7	-
Total participation days	22,639	-

Source: National Sporting Goods Association Sports Participation Report, 2009

Volleyball

Table B-11 indicates that 110,000 Oregonians participated in volleyball in 2008. Participants played volleyball an average of 22 days each year, which by NSGA standards is considered frequent.

Table B-11. 2008 Oregon Frequency of Volleyball Participation (In thousands)

Volleyball	Number	Percent of Total
Infrequent (2-4 days/year)	39	35%
Occasional (5-19 days/year)	29	26%
Frequent (20+ days/year)	42	38%
Total	110	100%
Average participation days per person	21.69	-
Frequency of participation	17	-
Total participation days	2,388	-

Source: National Sporting Goods Association Sports Participation Report, 2009

Football

Table B-12 shows the number of participants who played football in 2008. Nearly 74,000 Oregonians played football in 2008, and about 45% played 40 days or more each year. Football is the team sport with the lowest participation in Oregon.

Table B-12. 2008 Oregon Frequency of Football Participation (In thousands)

Football	Number	Percent of Total
Infrequent (2-9 days/year)	20	27%
Occasional (10-39 days/year)	8	11%
Frequent (40+ days/year)	45	61%
Total	74	100%
Average participation days per person	42.70	-
Frequency of participation	9	-
Total participation days	3,196	-

Source: National Sporting Goods Association Sports Participation Report, 2009

Baseball

Table B-13 shows the number of participants who played baseball in 2008. Approximately 183,000 Oregonians participated in baseball, and over a third (36%) of participants played on a frequent basis.

Table B-13. 2008 Oregon Frequency of Baseball Participation (In thousands)

Baseball	Number	Percent of Total
Infrequent (2-9 days/year)	32	17%
Occasional (10-49 days/year)	86	47%
Frequent (50+ days/year)	66	36%
Total	183	100%
Average participation days per person	60.00	-
Frequency of participation	6	-
Total participation days	1,564	-

Source: National Sporting Goods Association Sports Participation Report, 2009

Yoga

Table B-14 shows there were 394,000 yoga participants in Oregon in 2008. The majority of yoga participants participated in yoga more than 50 days during 2008, and they participated an average of 67 days per year (once every 5 days on average).

Table B-14. 2008 Oregon Frequency of Yoga Participation (In thousands)

Yoga	Number	Percent of Total
Infrequent (2-9 days/year)	90	23%
Occasional (10-49 days/year)	82	21%
Frequent (50+ days/year)	222	56%
Total	394	100%
Average participation days per person	66.9	-
Frequency of participation	5	-
Total participation days	26,347	-

Source: National Sporting Goods Association Sports Participation Report, 2009

Softball

Nearly 131,000 Oregonians reported that they played softball in 2008. Table B-15 shows that the majority (60%) of softball players participated on a frequent basis (40 days or more a year). Oregon's softball players participated an average of 63 days a year, or once every six days.

Table B-15. 2008 Oregon Frequency of Softball Participation (In thousands)

Softball	Number	Percent of Total
Infrequent (2-9 days/year)	19	15%
Occasional (10-39 days/year)	34	26%
Frequent (40+ days/year)	79	60%
Total	131	100%
Average participation days per person	62.8	-
Frequency of participation	6	-
Total participation days	8,246	-

Source: National Sporting Goods Association Sports Participation Report, 2009

IMPLICATIONS

The proposed community center and sports field complex could accommodate a variety of activities. This appendix focused on sports participation levels and trends as an indicator of potential demand of such activities at the proposed facilities. Specifically, we reviewed the following activities: exercise walking, swimming, running/jogging, soccer, basketball, work-out at club, aerobic exercising, exercising with equipment, weightlifting, volleyball, football, baseball, in-line roller skating, yoga, and softball.

Data from the National Sporting Goods Association's for sports participation at the national level indicate that participation in some activities continues to increase, while others decline. Increases in participation can translate into the need for additional facilities.

INDIVIDUAL ACTIVITIES

Both the national trend data and the 2008 Oregon data indicate participation of the following individual activities is either high or growing rapidly:

- Exercise walking
- Aerobic exercise

- Swimming
- Exercise with equipment
- Working out at a club
- Weightlifting
- Running/jogging
- Yoga

Although there are not enough data to provide an accurate trend for yoga participation, it appears that the participation rate has increased drastically between 2007 and 2008, which indicates that the participation rate may continue to increase in the future and additional facilities may be needed.

Both weightlifting and exercising with equipment tend to draw large amounts of participants in Oregon, but most participants engage in these activities either occasionally or infrequently.

Swimming appears to be extremely popular in Oregon, and a significant amount (25%) of participants swim on a frequent basis (110 days or more a year). This suggests that aquatic facilities will be well-utilized if offered at the proposed community center.

Both running/jogging and aerobic exercise have seen large average annual growth rates in the past ten years (4.8% and 3.4% respectively) at the national level. These activities also attract a large amount of participants at the Oregon level, suggesting that they would be popular in the Canby community as well.

Team Sports

Soccer and basketball appear to be the most popular team sports in the nation as well as in Oregon. National trends indicate that football is the fastest growing among team sports. Softball, volleyball, and baseball indicated a decline in growth over the past ten years.

In Oregon, basketball draws the largest amount of participants (315,000) of any team sport, yet it also has the lowest frequency of participation. Participants only play basketball an average of 16 days each year. This implies that basketball courts should be readily available for non-team or non-league use in order to provide access to recreational player

Nationally, soccer has experienced the greatest participation growth of any team sport since 2007. At the state level, a majority (57%) of participants indicated that they play soccer frequently (40 days or more a year). Assuming that these trends apply to the Canby area, this data suggests that offering facilities for outdoor soccer is necessary.

Oregonians play baseball and softball more days each year, on average, than any other team sport (60 days and 63 days each year respectively). This implies that an outdoor baseball field as an essential aspect of any sports field complex, and should be considered for the Canby complex.

Unfortunately, the NSGA does not provide complete data on lacrosse participation. It does report, however that over a million individuals played lacrosse in 2007. Anecdotally, it appears that

lacrosse has grown in popularity both nationally and at the state level in the past ten years. Because lacrosse can be played on the same field as football or soccer, additional facilities will not be required to accommodate the sport, making it an attractive sport to offer at the sports field complex.

APPENDIX C: RESULTS OF THE CAPRD HOUSEHOLD SURVEY

This appendix presents the results of a survey administered to randomly selected households in the Canby Area Park and Recreation District (CAPRD) boundary. Community Planning Workshop (CPW) surveyed area residents to gather information on sports participation patterns and attitudes concerning the proposed Community Center/sports field complex. The survey is intended to supplement demographic and market information gathered from other sources in order to assess demand for the proposed community center and sports field complex.

METHODS

CPW worked closely with the city staff and a group of stakeholders to develop the survey instrument. The initial draft of the survey was based on review of similar surveys, background research, interviews with facility managers, and input from the Canby city staff. Throughout the development of the survey instrument, CPW reviewed the instrument with city staff and the stakeholder group. A copy of the survey instrument is provided in Appendix C-1.

The survey focused on households in Canby and the surrounding Canby Area Park and Recreation District. We used Clackamas County voter registration data to obtain our sample. This source includes the names and addresses of all registered voters age 18 and over in Clackamas County. We randomly selected 1,500 names from the registration list. This list was carefully scrutinized to eliminate duplicate names and addresses. The survey was administered by mail during April 2009.

We received 246 valid responses, a 16.4 percent response rate. This response had a 6.2% margin of error with a confidence interval of 95%. A key issue in the administration and analysis of sample surveys is response bias. If one were to assume that the sample was perfectly random and that there was no response bias, then the survey would have a margin of error of ±5% at the 95% confidence level. In simple terms, this means that if survey were conducted 100 times, the results would end up within ±5% of those presented in this report. One limitation of the study's methodology is potential non-response bias from the mailed survey.

The survey results represent higher percentages of females and college educated residents in Canby than reported by the Oregon Prospector database in 2009. Moreover, it does not include Canby residents that were not registered to vote in 2009. Despite these areas of potential response bias, our assessment is that the results provide an accurate representation of the attitudes and opinions of Canby residents in 2009.

Due to the fact that voter registration information was used, a limitation of this survey is accessing respondents under the age of 18. To capture information about youth sports activities, the questions within the survey tool were directed towards the activities of an entire household. Furthermore, CPW used a stratified sampling technique that weighted answers from younger respondents more heavily than those from older respondents.

Additionally, because the survey relies on self-reported information, it is inherently limited by issues like false reporting, poor memory, and misinterpretation of questions.

RESPONDENT CHARACTERISTICS

While 246 individuals responded to the survey, several questions were designed to capture information at the household level. As a result, the survey actually represents sports participation information for 367 people (113 people under the age of 18, 204 between the ages of 18 and 65, and 50 people over 65). The majority of the respondents were female (70% female, 30% male).

About 80 percent of the respondents lived in Canby, and 66 percent of those residents lived within the Canby city limits. Oregon City and Aurora were the next most common places respondents lived. Respondents have lived in the Canby area for an average of 18 years (with answers ranging from a few months to 81 years).

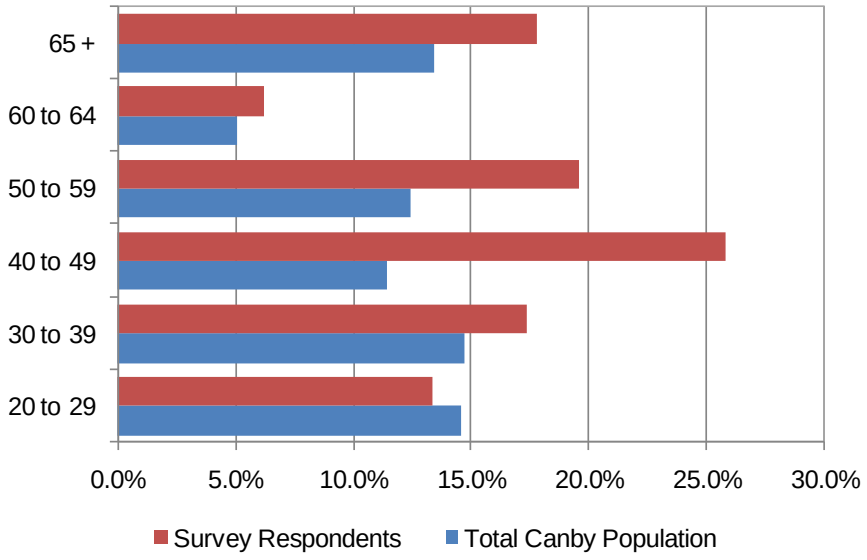
Over 83 percent of respondents reported having some college education and 35 percent reported being employed full-time. The median income range of respondents was between $60,000 and $100,000 per year.

When discussing survey results based upon a population sample, it is important to identify and describe the demographic characteristics of the sample, and compare them to the characteristics of the population as a whole. Significant demographic differences that may exist between the sample and the population as a whole could indicate areas of response bias.

Figure C-1 shows the age distribution of respondents compared to the general population in Canby[6]. A comparison of the age distribution of the survey sample and the age distribution of Canby shows that all age groups over 29 years were over-represented in the sample, while age groups between 20 and 29 years were under-represented. Higher response rates among older residents are common in surveys like the Canby Community Center and Sports Field Complex Survey.

[6] The sample frame for the survey was registered voters in the Canby Urban Growth Boundary (UGB). Thus, the sample was intended to include individuals aged 18 or older. Moreover, not all individuals 18 or over are registered to vote. Voter registration records for Canby indicate that approximately 8,264 residents were registered to vote in 2009. The 2009 Oregon Prospector community profile reported that Canby had about 10,900 residents aged 18 and over in 2009.

Figure C-1. Age of Survey Respondents



Sources: Canby Community Center and Sports Field Complex Survey, CPW, 2009;
Oregon Prospector, Canby Community Profile, 2008

The gender distribution of 2009 survey respondents had a higher percentage of females than the gender distribution of Canby residents in 2008 as reported by the Oregon Prospector database. Table C-1 shows that females accounted for 70% of the survey respondents and 51% of Canby residents.

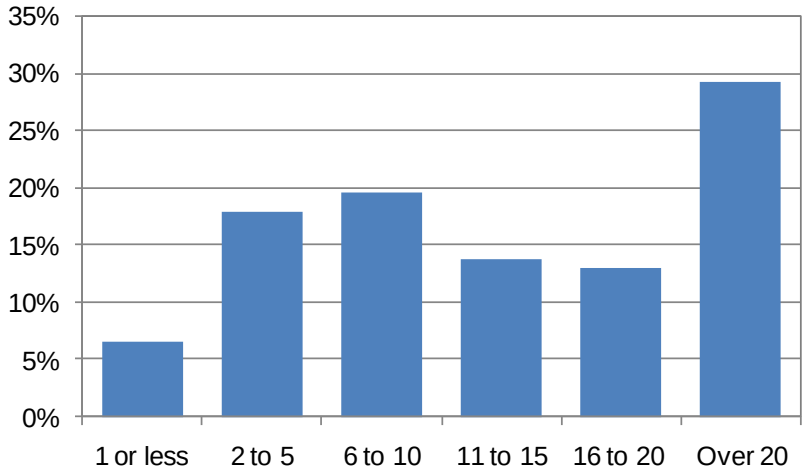
Table C-1. Gender of Survey Respondents

Gender	2009 Survey	2008 Population
Male	30%	49%
Female	70%	51%

Sources: Canby Community Center and Sports Field Complex Survey, CPW, 2009;
Oregon Prospector, Canby Community Profile, 2008

Figure C-2 shows length of residency of survey respondents. The results indicate that many long-term residents responded to the Canby Community Center and Sports Field Complex Survey. Nearly 30% of respondents have lived in Canby for more than 20 years. Approximately 25% of the respondents, however, have lived in Canby for 5 or fewer years.

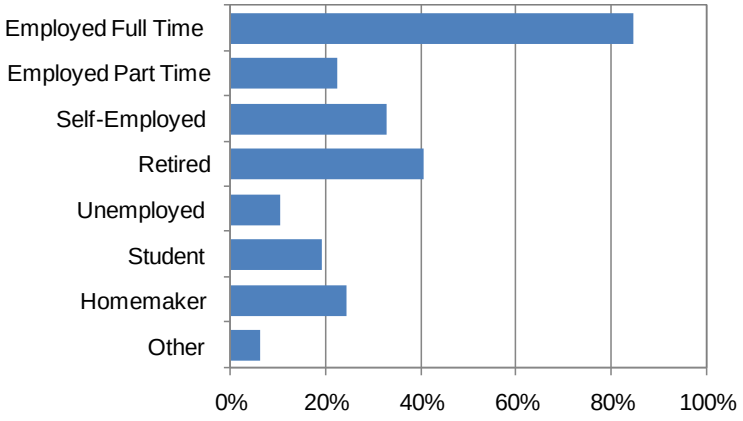
Figure C-2. Residency of Survey Respondents



Source: Canby Community Center and Sports Field Complex Survey, CPW, 2009

The survey also asked about residents' employment status and 2008 household income, before taxes. Figure C-3 shows employment status, as reported by survey respondents. The most frequently selected response (about 47% of all responses) was "employed, outside Canby." About 28% of respondents indicated they were retired, while 18% indicated they were employed in Canby.

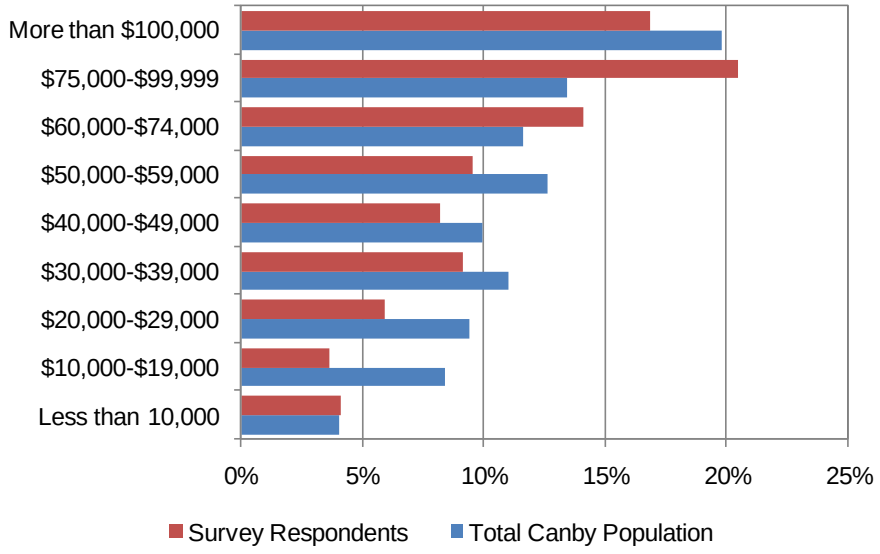
Figure C-3. Employment Status of Survey Respondents



Source: Canby Community Center and Sports Field Complex Survey, CPW, 2009

Figure C-4 shows the household income distribution for survey respondents compared to 2009 data from the Oregon Prospector database. This data shows that while households earning less than $10,000 annually were adequately represented in this survey, households earning between $10,000 and $59,000 were under-represented. Over 60% of respondents reported earning more than $50,000 annually. The 2000 Census reported that about 45% of Canby households earned $50,000 or more in 2008.

Figure C-4. Total Household Income Comparison, 2008



Sources: Canby Community Center and Sports Field Complex Survey, CPW, 2009;
Oregon Prospector, Canby Community Profile, 2008

SURVEY FINDINGS

The following sections summarize the responses from the mailed survey. The survey included 27 questions related to the respondents' current sports participation, the desired activities and amenities of the proposed facilities, and a number of other topics. These questions were divided into the following sections:

- Current Sports Participation
- Current Facility Use
- Desired Community Center Characteristics
- Future Community Center Use
- Desired Sports Field Characteristics
- Future Sports Field Use
- Facility Siting

The survey analysis will be grouped by the same categories. The reader will note that many of the questions in our survey allowed the respondent to offer open-ended comments. When applicable, these comments are summarized in this report. A list of verbatim responses can be found in Appendix C-1 of this report.

Current Sports Participation

The purpose of this section was to collect data on current sports and activity trends in the Canby area. Apart from identifying sports and activities that are popular among Canby residents, this section also helps to assess the respondents' frequency of participation and the level of commitment they have to each sport.

Question 1: Which of the following recreation or exercise activities have you or members of your household participated in during the last 12 months (Check all that apply).

Respondents indicated that exercise walking was the most common activity participated in with 76% of individuals indicating that they walked for exercise at least once in the last year. This figure reflects national participation patterns collected from the National Sporting Goods Association (NSGA) that list exercise walking as the most common form of exercise in the US (see Appendix B).

Of the top ten most popular activities reported, half are commonly performed in facilities similar to the proposed community center. These activities include strength and flexibility training (42%), running or jogging (40%), treadmill and stair machine use (37%), weight training (37%), and aquatics (27%). Not surprisingly, more specialized activities requiring indoor facilities, such as gymnastics, wrestling, and squash were less popular with the respondents of this survey.

Activities requiring outdoor fields, such as football, baseball, and lacrosse received surprisingly low participation rankings compared to national NSGA figures. This may be explained by an uncharacteristically low interest in these sports among Canby residents or a lack of proper facilities in the area.

Non-athletic activities were also important to survey respondents. At least 20% of individuals indicated that they participated in either arts and crafts, after school programs, or the performing arts in the last year. This implies that the proposed community center should be multi-purpose and should include opportunities for non-athletic activities and amenities as well as the more typical sports-related activities.

Table C-2. Sports/Activities Participated In During the Last 12 Months

Activities	Number	Percent
Walking	188	76.4%
Biking	114	46.3%
Strength and flexibility	103	41.9%
Running/Jogging	99	40.2%
Treadmill/Stair machine	91	37.0%
Weight training	91	37.0%
Bowling	82	33.3%
Arts & Crafts	74	30.1%
Golf	73	29.7%
Aquatics	67	27.2%
Aerobics	64	26.0%
Basketball	61	24.8%
Soccer	59	24.0%
After school programs	57	23.2%
Performing Arts	56	22.8%
Dance	51	20.7%
Swimming (laps)	48	19.5%
Yoga/Tai Chi	48	19.5%
Swimming (lessons)	43	17.5%
Baseball	42	17.1%
Football	38	15.4%
Pilates	37	15.0%
Tennis	37	15.0%
Softball	34	13.8%
Rock climbing	29	11.8%
Volleyball	29	11.8%
Water Aerobics	29	11.8%
Parent/Child programs	28	11.4%
Indoor Soccer	27	11.0%
Senior activities	26	10.6%
Track and field	26	10.6%
Frisbee (Ultimate, Golf)	24	9.8%
Equestrian	23	9.3%
Horseshoes	23	9.3%
Skateboarding	22	8.9%
Racquetball	20	8.1%
Marathon/triathlon	17	6.9%
Other (Please specify)	16	6.5%
Boxing/Martial Arts	15	6.1%
Gymnastics	12	4.9%
Rowing (incl. machines)	10	4.1%
Lacrosse	7	2.8%
Rugby	6	2.4%
Wrestling	6	2.4%
Squash	0	0.0%
TOTAL	**246**	**100.0%**

Source: Canby Community Center and Sports Field Complex Survey, CPW, 2009

Question 2: Please list the three recreation or exercise activities you or your household members participate in most often (please include participant's age). Then, estimate the number of days of participation per year.

This question asked respondents to identify the sports and activities they most frequently participate in and how often they participate in them. Table C-3 shows the results of this question.

We encourage the reader to use caution when interpreting this data set. The average amount of days respondents participate in an activity is based on *only* those respondents who indicated that they participate in the activity. Because the actual number of respondents is generally low, activities that have high frequencies of participation may be misleading. For example, skateboarding is ranked as the most frequently participated sport with respondents indicating that they skateboard on average 227 days each year. However, this figure is based on only seven respondents and should not be considered to be a representative sample of Canby residents.

Cross-referencing the number of respondents with the frequency of participation provides more reliable data. For example, a relatively large number of respondents indicated that they walked, played soccer, or swam at least twice a week. Additionally, respondents indicated that they participated in activities like yoga, aerobics, and weight training at least three times a week. This suggests that indoor activities that would be supported by the proposed community center would be used frequently.

Table C-3. Frequency and Age of Participation

Activity	Number of Respondents	Average Age	Average Days	Average Days/Week
Walking	98	36.0	160.1	3
Soccer	45	11.0	90.3	2
Swimming/Aquatics	45	21.9	79.8	2
Running	37	40.2	180.0	4
Biking	37	34.7	105.5	2
Baseball/Softball	30	20.6	89.1	2
Weight training	28	35.7	146.9	3
Basketball	27	18.1	105.3	2
Golf	27	44.0	45.0	1
Arts & crafts	26	31.4	137.0	3
Treadmill/stair machine	20	52.4	147.7	3
Aerobics	19	35.6	152.3	3
Football/Rugby	19	14.4	86.9	2
Dance	18	35.2	91.6	2
Yoga/Pilates	17	44.0	187.7	4
Equestrian	15	34.1	220.5	5
Strength & Flexibility	13	42.2	121.9	3
Exercise club	10	48.0	162.6	3
Tennis	10	20.5	76.2	2
Skateboard	7	21.0	226.9	5
Volleyball	7	19.2	136.5	3
After school program	6	8.8	57.8	1
Senior activities/Exercise	5	79.5	114.3	2
Racquetball	4	43.0	77.5	2
Hiking	4	47.8	18.5	0

Source: Canby Community Center and Sports Field Complex Survey, CPW, 2009

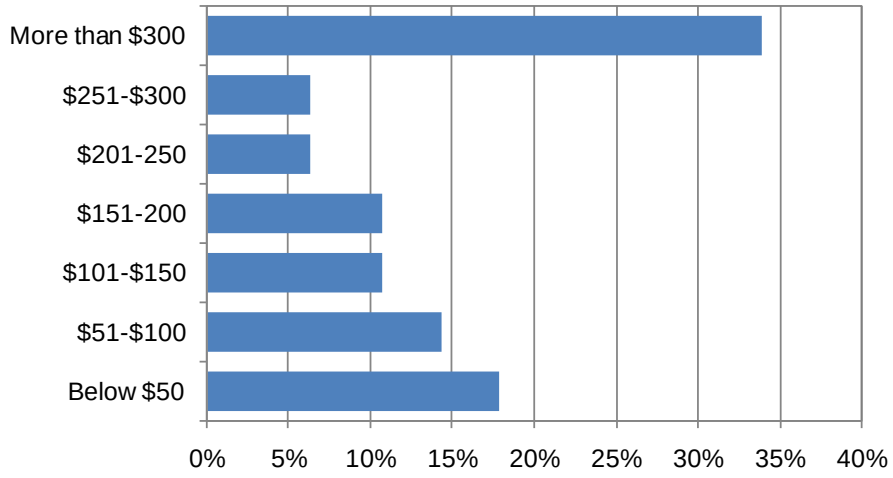
Question 3: Have you or any members of your household participated in a sports team/league in the previous year? If so, what sport and how much did your household spend on team/league registration?

Nearly 42% of respondents indicated that they participated in team or league sports in the last year. For those enrolled in youth leagues, the most common sports were soccer, basketball, and baseball. League sports for adults followed a similar pattern, with soccer being most common and basketball and softball following behind. These findings indicate that facilities that accommodate these sports could be utilized by a range of age groups.

This question also asked respondents how much their household spent on team and league registration fees over the last year. The most common response was 'More than $300' (34%). This figure does not capture how many individuals these fees are covering, but it does show that a significant number of responding households are willing to pay over $300 a year to participate in team sports. This implies that the proposed facilities should either offer team sports or allow existing leagues to rent the facilities for a fee.

The second most common response was 'Below $50' (18%), indicating that the majority of respondents fell within either the high end or the low end of payers of registration fees.

Figure C-5. Annual Sports Team/League Expenditures



Source: Canby Community Center and Sports Field Complex Survey, CPW, 2009

Question 4: On average, how often do you or members of your household engage in recreation or exercise activity?

The majority of respondents (52%) indicated that they engage in recreation or exercise activity 4-7 days a week. While this figure shows strong support for the proposed facilities within the Canby community, it is possible that this figure may be higher than actual activity levels. It is important to note that questions related to personal physical activity, like this one, may be impacted by social desirability bias. In other words, respondents may have indicated that they exercise more than they actually do because they feel that being physically active is a desirable trait.

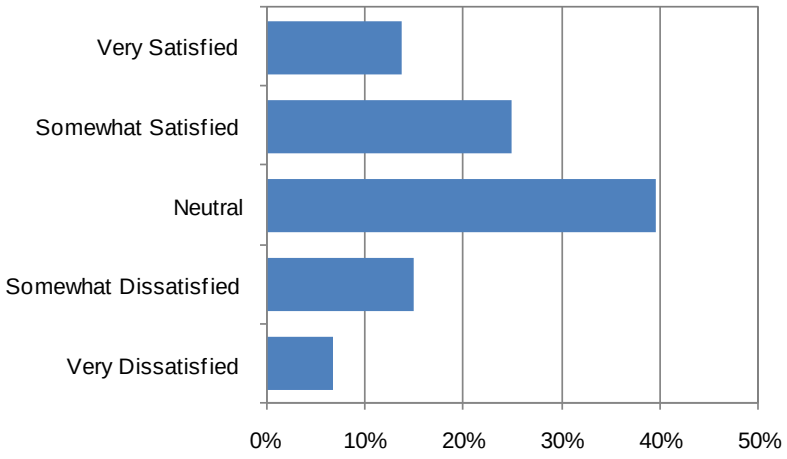
Question 5: How satisfied are you with the opportunities to recreate or exercise in and around the City of Canby?

Respondents indicated that they were generally satisfied with opportunities to recreate or exercise in Canby. Nearly 39% of individuals indicated that they were either 'Very Satisfied' or 'Satisfied' with Canby's recreational offerings, while only 22% stated they were either 'Extremely Dissatisfied' or 'Dissatisfied.'

It is interesting to note that 39% of respondents indicated that they were 'Neutral' when asked this question. This figure may suggest that there is room for improvement when it comes to improving and promoting the diversification of recreational facilities in Canby[7.]

[7] Goal 3 of the Canby Parks and Recreation Master Plan is to "Improve and promote diversification of recreational programs and facilities."

Figure C-6. Satisfaction with Recreational Opportunities in Canby



Source: Canby Community Center and Sports Field Complex Survey, CPW, 2009

CURRENT FACILITY USE

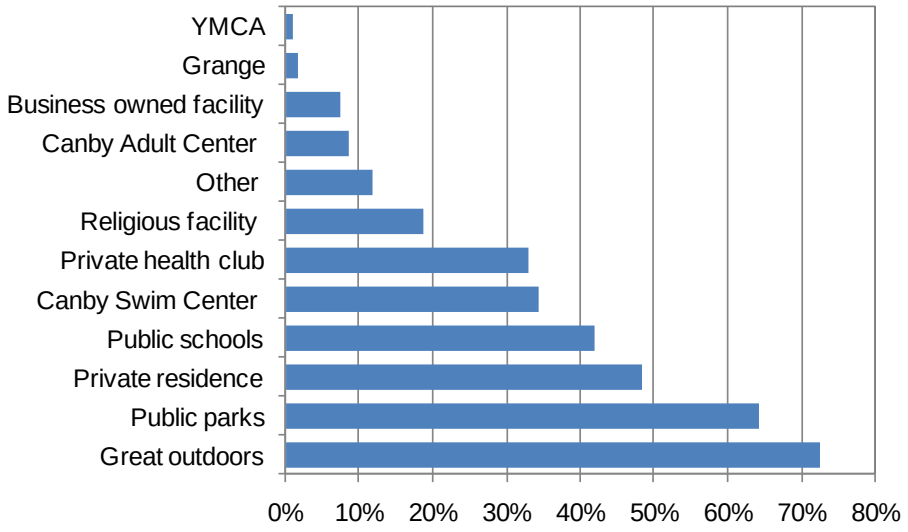
The purpose of this section was to collect information about the facilities that respondents currently use for recreation and exercise.

Question 6: What type(s) of facilities do you or members of your household use for recreation or exercise?

An overwhelming majority of respondents (72%) indicated that they utilized the outdoors for their recreational and exercise needs (see Figure C-7). Other popular responses were public parks (64%), private residences (48%), and public schools (42%)[8].

[8] Because respondents were asked to select all applicable facilities, the responses sum to more than 100%.

Figure C-7. Types of Recreational Facilities Used



Source: Canby Community Center and Sports Field Complex Survey, CPW, 2009

Summary of Comments

Nearly 12% of respondents indicated that they used facilities not listed within our survey. While many of these qualified as 'Business owned facilities' (i.e. Pay n' Go Racquetball, golf courses, and dance studios), there were a number of individuals that indicated that they used the fairgrounds for recreational purposes. For a complete list of additional facilities, please see Appendix C-2 of this report.

Question 7: Do you or members of your household belong to or use indoor recreation or exercise facilities outside of the Canby area?

The majority (62%) of respondents indicated that they did not belong to or use indoor recreation or exercise facilities outside of the Canby area. Of the 38% who do use facilities outside of the area, the majority use facilities in either Wilsonville, Oregon City, or Clackamas. Table C-4 shows the top five most common locations of sports and recreation facilities used outside of the Canby area.

Table C-4. Location of Common Facilities Used Outside Canby Area

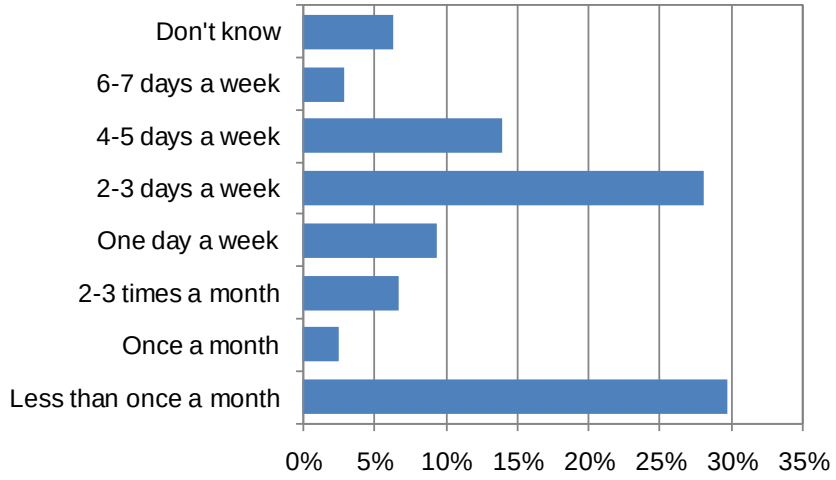
City	Number of Respondents	Percentage
Wilsonville	22	24%
Oregon City	15	17%
Clackamas	10	11%
Tualatin	8	9%
Portland	5	6%

Source: Canby Community Center and Sports Field Complex Survey, CPW, 2009

Question 8: On average, how often do you or members of your household use an indoor recreation or exercise facility?

Responses to this question suggests that there is a high frequency of households that use indoor recreation facilities 2-3 days a week (28%) and a high frequency of households that use these facilities less than once a month (30%). Despite this seemingly inconsistent response, it is important to note that the majority (54%) of respondents indicated that they use indoor facilities on a weekly basis. This suggests a high demand for a facility like the proposed community center.

Figure C-8. Anticipated Frequency of Community Center Use



Source: Canby Community Center and Sports Field Complex Survey, CPW, 2009

DESIRED COMMUNITY CENTER CHARACTERISTICS

This section collected data about respondents' preference for certain features and amenities at the proposed community center.

Question 9: Please indicate the level of importance for each of the following community center facility categories and the specific activities/programs that follow.

To determine the overall recreational priorities of local residents, we asked respondents to indicate the importance of various facility components and programs (see Tables C-5. through C-9). The results suggest a desire of respondents for a year-round community pool and related aquatic activities. Multi-purpose activity centers and indoor athletic capabilities ranked the second and third most important facility components. This implies that respondents have a preference for general use spaces and facilities that would allow a variety of activities as opposed to more specialized courts like handball or racquetball.

Tables C-5 through C-9 also break down the preference for the related activities of each main facility type. The results are sorted by mean scores within each category. The higher the score, the greater the preference for an individual activity or amenity is.

Aquatic Activities

A children's swimming program was the top ranking activity with about 42% of respondents listing it as very important. Lap swimming and water exercise classes were also ranked high by respondents,

suggesting that these are important activities for Canby residents. Programs and amenities that tend to be exclusive like swim teams and diving were considered less important.

Table C-5. Level of Importance of Aquatic Activities

	Not Important			Very Important		
	1	**2**	**3**	**4**	**5**	**Average Score**
Year-Round In-door Aquatic Center	17.1%	5.2%	14.0%	22.3%	41.5%	**3.7**
Children's swimming (open/lessons)	17.7%	9.3%	14.6%	19.0%	39.4%	3.5
Lap swimming for adults	13.2%	8.3%	23.7%	30.7%	24.1%	3.4
Senior water exercise	16.6%	6.6%	25.8%	25.8%	25.3%	3.4
Adult swim classes	18.3%	12.9%	26.8%	22.8%	19.2%	3.1
Special programs	19.6%	12.3%	26.0%	26.0%	16.0%	3.1
Swim team	23.9%	11.7%	27.0%	19.4%	18.0%	3.0
Water slide/Lazy River	21.3%	13.6%	33.0%	16.7%	15.4%	2.9
Masters swim team	29.2%	17.6%	29.6%	14.8%	8.8%	2.6
Diving	29.3%	21.2%	27.9%	13.1%	8.6%	2.5
Other (please specify)	61.5%	9.6%	11.5%	5.8%	11.5%	2.0

Source: Canby Community Center and Sports Field Complex Survey, CPW, 2009

Multi-Purpose Facilities

Although the category of teen space/activities had the highest average score the distribution of level of importance was spread out almost evenly. Except for games, the rest of the activities had mid-range importance levels indicating an interest in a variety of non-physical activities and a need for a space flexible enough to accommodate them.

Table C-6. Level of Importance of Multi-Purpose Facilities

	Not Important			Very Important		
	1	**2**	**3**	**4**	**5**	**Average Score**
Multi-Purpose Activity Center	10.8%	5.4%	25.1%	27.5%	31.1%	**3.6**
Teen space/activities	11.1%	4.2%	20.4%	34.3%	30.1%	3.7
Music	10.0%	7.2%	24.0%	30.8%	28.1%	3.6
Senior space/activities	9.5%	5.9%	30.3%	31.2%	23.1%	3.5
Parenting/Community classes	12.1%	7.0%	25.6%	30.7%	24.7%	3.5
Large meeting space(s)/event center	11.5%	9.2%	25.2%	28.9%	25.2%	3.5
Small meeting space(s)/classrooms	10.5%	10.0%	29.5%	25.0%	25.0%	3.4
Crafts	11.6%	8.8%	29.2%	27.8%	22.7%	3.4
Support groups	13.6%	7.0%	29.6%	28.6%	21.1%	3.4
Dances	17.6%	10.2%	28.7%	24.1%	19.4%	3.2
Games (arcade/billiards/pool table)	13.7%	13.7%	33.6%	23.7%	15.2%	3.1
Other (please specify)	48.7%	5.1%	17.9%	7.7%	20.5%	2.5

Source: Canby Community Center and Sports Field Complex Survey, CPW, 2009

Indoor Athletic Activities

This category also reflects an interest in activities for children and youth. About 47% of the respondents considered youth sports an important program type. Aerobics and weight training also

ranked high as preferred activities. As with aquatic activities, responses followed the trend that the more specialized and/or limiting an activity, the less important it became.

Table C-7. Level of Importance of Indoor Athletic Activities

	Not Important			Very Important		
	1	**2**	**3**	**4**	**5**	**Average Score**
Indoor Athletic Activities	17.7%	6.3%	17.1%	26.3%	32.6%	**3.5**
Youth sports	16.9%	5.0%	13.2%	18.3%	46.6%	3.7
Aerobics classes	15.7%	4.5%	27.4%	25.6%	26.9%	3.4
Weight training equipment	16.4%	8.6%	18.6%	30.0%	26.4%	3.4
Drop-in basketball	16.7%	7.9%	27.0%	23.7%	24.7%	3.3
Indoor track	17.4%	13.7%	28.3%	26.5%	14.2%	3.1
Volleyball	19.7%	11.9%	32.1%	24.3%	11.9%	3.0
Rock climbing	20.8%	19.4%	29.6%	16.2%	13.9%	2.8
Indoor soccer	22.9%	16.1%	31.7%	14.7%	14.7%	2.8
Martial Arts	22.3%	15.3%	32.1%	22.3%	7.9%	2.8
Tennis classes	21.2%	17.1%	36.9%	17.1%	7.8%	2.7
Gymnastics	22.8%	18.1%	35.3%	17.2%	6.5%	2.7
Ping pong	25.1%	20.5%	34.4%	13.0%	7.0%	2.6
Badminton	25.8%	21.7%	34.6%	13.8%	4.1%	2.5
Wrestling	30.7%	22.3%	29.8%	12.1%	5.1%	2.4
Other (please specify)	49.1%	7.3%	16.4%	7.3%	20.0%	2.4

Source: Canby Community Center and Sports Field Complex Survey, CPW, 2009

Support Space/Facilities

When asked to rank the types of support space, general use space such as locker rooms and shower rooms are preferred over storage areas or snack/juice bars. Respondents also indicated a strong desire for a child care facility within the community center.

Table C-8. Level of Importance of Support Space/Facilities

	Not Important			Very Important		
	1	**2**	**3**	**4**	**5**	**Average Score**
Support Space/Facility	14.7%	8.7%	27.3%	22.7%	26.7%	**3.4**
Locker room	9.5%	6.3%	18.9%	33.8%	31.5%	3.7
Shower room	8.6%	7.2%	22.2%	32.6%	29.4%	3.7
Lobby/Check in area	11.0%	7.3%	33.0%	24.8%	23.9%	3.4
Childcare facility	15.4%	7.9%	22.9%	26.2%	27.6%	3.4
Kitchen	15.7%	10.6%	29.5%	20.7%	23.5%	3.3
Snack/Juice Bar	15.8%	12.2%	26.7%	26.7%	18.6%	3.2
Storage	13.4%	11.6%	38.4%	20.4%	16.2%	3.1
Other (please specify)	61.1%	2.8%	19.4%	5.6%	11.1%	2.0

Source: Canby Community Center and Sports Field Complex Survey, CPW, 2009

Special Courts/ Facilities

The categories in this section show higher percentages in the least important column indicating that racquet sports and handball are less important to survey respondents. This is consistent with the

rest of the results indicating a preference for activities accessible to many levels of expertise and age. Of these three choices, racquetball is shown as the most popular activity.

Table C-9. Level of Importance of Special Courts/Facilities

	Not Important			Very Important		
	1	**2**	**3**	**4**	**5**	**Average Score**
Special Courts/Facilities	25.8%	14.7%	30.7%	16.6%	12.3%	**2.7**
Racquetball	20.6%	16.5%	33.9%	17.4%	11.5%	2.8
Handball	21.7%	21.2%	38.6%	14.3%	4.2%	2.6
Other (please specify)	60.5%	16.3%	9.3%	4.7%	9.3%	1.9
Other (please specify)	71.4%	17.1%	8.6%	0.0%	2.9%	1.5

Source: Canby Community Center and Sports Field Complex Survey, CPW, 2009

Question 10: Please indicate the importance of the following community center facility characteristics on a scale of 1 to 5 (Circle the appropriate number—5=Very important, 1=Not important)

Table C-10 shows the importance of selected facility characteristics to survey respondents. Cleanliness received the highest ranking with 85% of respondents indicating this was a very important element of the facility. Affordability and equipment condition were the next most important characteristics to respondents. Respondents want a clean, well-kept facility with decent scheduling, operating equipment and friendly staff. Ensuring access by providing automobile and bicycle parking was also an important characteristic of the proposed facility.

In relation to the ranking of the other characteristics, the availability of childcare and the use of green building features were not considered as crucial, yet the results indicate they are still important considerations. Surprisingly, location-related characteristics received the lowest rankings in this question. Respondents seem to be neutral to the idea of the community center being located near schools, sports fields, or even downtown Canby.

Table C-10. Importance of Community Center Characteristics

Facility Characteristics	Average Score
Facility is clean	4.7
Good value for the money/affordable	4.6
Equipment is always working properly	4.6
Has a good reputation	4.5
Instructors and staff are friendly	4.5
Hours of operation	4.4
Variety of programs available	4.4
Ease of automobile parking	4.2
Ease of bicycle/pedestrian access	4.1
Doesn't smell like a gym	4.0
Close to home/work (i.e., less than 5 minutes)	3.9
There are plenty of staff members to help me	3.8
Membership is diverse	3.8
Childcare is available	3.6
Green building materials	3.6
Close to schools/parks (i.e., less than 5 minutes)	3.5
Close to sports fields (i.e., less than 5 minutes)	3.4
Close to downtown (i.e., less than 5 minutes)	3.4
Other (Please specify)	2.4

Source: Canby Community Center and Sports Field Complex Survey, CPW, 2009

FUTURE COMMUNITY CENTER USE

The purpose of this section was to assess the demand and level of future use for the proposed community center. Note that questions 12–16 were only answered by individuals who indicated that they would use the proposed community center.

Question 11: Would you or members of your household use an indoor community center built in the Canby area if it offered a broad range of activities and programs?

A majority (73%) of respondents indicated that they would use the proposed community center indicating a strong level of demand for the facility. Of those who indicated that they would not support the community center (14%), a general lack of interest was most commonly cited. Other reasons provided include time restrictions and the desire to exercise in private or outdoors.

Nearly 13% of respondents indicated that they were unsure if they would use the community center. Table C-11 shows the distribution of explanations for this response. The most common reasons provided were cost and the types of activities provided. The location of the facility and its hours of operation were also cited with a significantly lower frequency than cost and activities.

Table C-11. Reasons for Uncertainty about Community Center Use

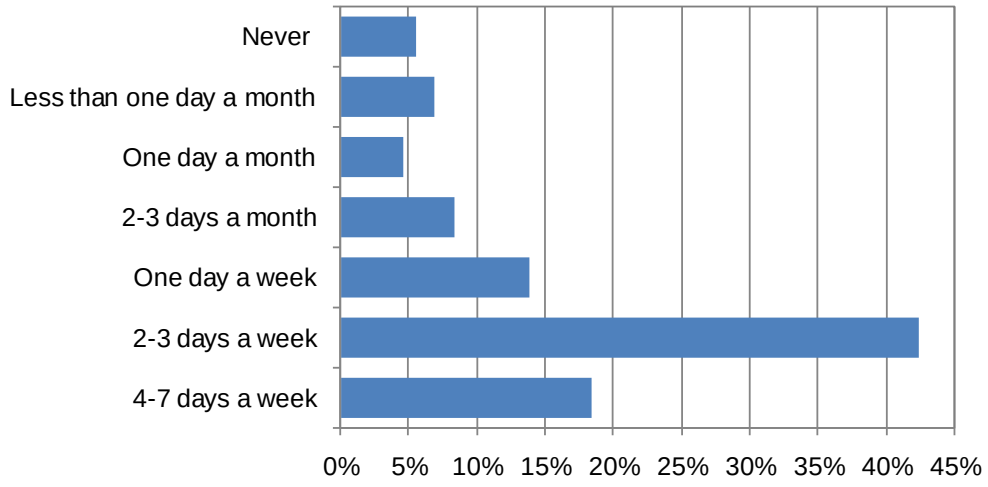
Comment	Count	Frequency
Cost	15	High
What activities are offered	12	
Location	3	Medium
Hours of operation	2	
Crowding	1	Low
Overlap with existing facilities	1	

Source: Canby Community Center and Sports Field Complex Survey, CPW, 2009

Question 12: How often do you think you or members of your household would you use an indoor community center built in the Canby area?

Figure C-9 shows the anticipated frequency of facility use for those respondents who indicated they would use the facility. Over 74% of the respondents replied that they would use the facilities at least once a week, with about 42% indicating they would use it 2-3 times a week. This supports a need and desire for a community sports facility, at least among survey respondents.

Figure C-9 Anticipated Frequency of Community Center Use



Source: Canby Community Center and Sports Field Complex Survey, CPW, 2009

Question 13: Which of the following community center programs and facilities do you expect you or members of your household would attend or use? (Check all that apply)

Table C-12 shows anticipated program use by survey respondents. The top three categories include fitness classes, aquatics and use of fitness equipment. Court sports and use of a weight room were also important to a substantial percentage of respondents. While other activities such as parent-child classes and recreation programs for the elderly received fewer responses, such programs could easily generate enough use to be offered at the facility.

Table C-12. Anticipated Community Center Program and Facility Use

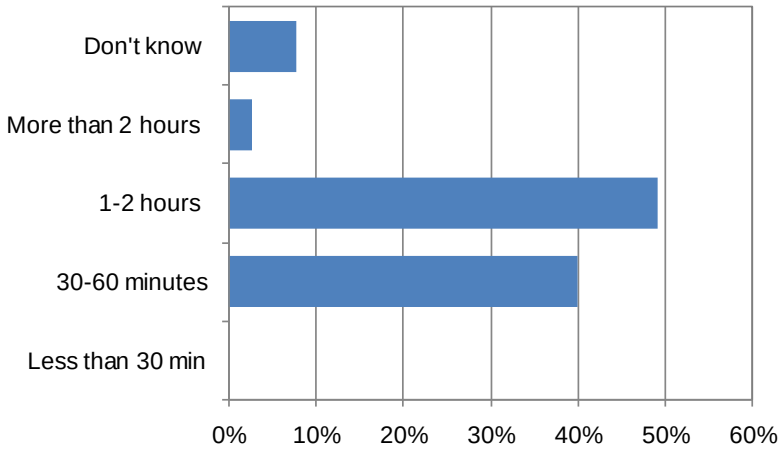
Activities	Percentage
Fitness classes	60%
Swimming pool	59%
Fitness equipment	57%
Weight room	50%
Locker/shower rooms	43%
Court sports (basketball, racquetball, tennis etc.)	41%
Weight training classes	40%
Indoor track	38%
Whirlpool/jacuzzi	37%
Arts/crafts classes	37%
Youth sports/activities	37%
Aquatics classes	36%
Water slide	35%
Climbing wall	33%
Recreation program for youth/children	33%
League/team sports	30%
Recreation program for young and middle aged adults	30%
Playground	30%
Sauna	28%
Senior fitness/exercise	24%
Dance studio	22%
Conference/meeting room	20%
Parent-child classes	17%
Recreation program for elderly	17%
Drop-in child care	15%
Kitchen facilities	11%
Audio/Visual equipment	6%
Recreation program for disabled	5%
Other (Please specify)	3%

Source: Canby Community Center and Sports Field Complex Survey, CPW, 2009

Question 14: Please estimate how long per average visit individual household members would use the community center?

Nearly 90% of respondents indicated that they would spend between 30 minutes and 2 hours for each visit to the proposed facility. No respondents indicated that they would spend less than 30 minutes at the facility, indicating that visitors are likely to engage in multiple activities or activities that often require a greater time commitment such as basketball or swimming.

Figure C-10. Anticipated Length of Typical Visit



Source: Canby Community Center and Sports Field Complex Survey, CPW, 2009

Question 15: How much would you or members of your household be willing to pay to use a community center on a per visit basis, both per person and per household?

The average individual fee respondents indicated they were willing to pay was around $5. Table C-13 shows a distribution of how much respondents indicated they were willing to pay per community center visit. A large portion of respondents (33%) indicated that they would not be willing to pay anything for the use of the facility. Nearly 10% of respondents indicated that they would spend $10 or more per visit.

Table C-13. Amount Respondents are Willing to Pay Per Visit (Individual)

Amount Per Visit	Count	Percent
Less than $1	80	33%
$1.00 - $4.99	76	31%
$5.00 - $9.99	66	27%
$10 or more	24	10%

Source: Canby Community Center and Sports Field Complex Survey, CPW, 2009

The average household fee respondents indicated they were willing to pay was about $13. Oddly enough, a slightly higher percentage of respondents (37%) indicated they would not be willing to pay a household fee compared to an individual fee. This difference is likely due to confusion or respondent error. Over 11% of respondents indicated that they would be willing to pay $20 or more per visit.

Table C-14. Amount Respondents are Willing to Pay Per Visit (Household)

Amount Per Visit	Count	Percent
Less than $1	91	37%
$1.00 - $9.99	51	21%
$10.00 - $19.99	77	31%
$20 - $30	19	8%
Over $30	8	3%

Source: Canby Community Center and Sports Field Complex Survey, CPW, 2009

Question 16: Would you or members of your household take advantage of monthly community center memberships if they were available?

Nearly 64% of respondents that plan to use the community center indicated that they would take advantage of a monthly membership. The average monthly membership fee respondents indicated they were willing to pay for an individual was $25. Nearly 11% of respondents indicated that they were willing to pay more than $30 per month. This implies that it may be possible to have a tiered membership model that offers different memberships and services at a variety of price points.

Table C-15. Amount Respondents are Willing to Pay Per Month (Individual)

Amount Per Month	Count	Percent
Less than $1	120	49%
$1.00 - $9.99	6	2%
$10.00 - $19.99	28	11%
$20 - $30	66	27%
Over $30	26	11%

Source: Canby Community Center and Sports Field Complex Survey, CPW, 2009

The average monthly membership fee respondents indicated they were willing to pay for a household was $56. Around 11% of respondents indicated that they were willing to pay over $70. This figure also supports the idea of having multiple membership options with different monthly fees. For example, a basic membership may offer access only to exercise equipment, while a premium membership provides access to aquatic facilities.

Table C-16. Amount Respondents are Willing to Pay Per Month (Household)

Amount Per Month	Count	Percent
Less than $1	113	46%
$1.00 - $29.99	15	6%
$30.00 - $49.99	44	18%
$50 - $70	48	20%
Over $70	26	11%

Source: Canby Community Center and Sports Field Complex Survey, CPW, 2009

DESIRED SPORTS FIELD CHARACTERISTICS

This section collected data about respondents' preference for certain features and amenities at the proposed sports field complex.

Question 17: Please indicate the level of importance for each of the following sports field facility activities / programs. (5=Very important, 1=Not important)

Nearly 31% of respondents indicated that it was very important to offer a softball/baseball field at the proposed facility. This was followed closely by soccer, which 30% of respondents indicated was very important to them. Respondents were significantly less interested in the sports field complex offering activities like lacrosse and ultimate frisbee.

Table C-17. Level of Importance of Sports Field Activities and Programs

Field Type	Average Score
Softball/Baseball	3.3
Soccer	3.2
Football	3.0
Lacrosse	2.4
Ultimate Frisbee	2.4
Other (please specify)	2.1

Source: Canby Community Center and Sports Field Complex Survey, CPW, 2009

Summary of Comments

There were 13 respondents that indicated they would like to see the proposed sports field complex offer activities other than those listed in our survey. Of these responses, frisbee golf, track and field, and volleyball were the most commonly requested sports, each receiving a similar frequency of recommendations.

Question 18: Please indicate the importance of the following sports field facility characteristics on a scale of 1 to 5 (Circle the appropriate number—5=most important, 1=least important)

Table C-18 shows the importance of selected sports field characteristics to survey respondents. Affordability and cleanliness both received the highest ranking with roughly 65% of respondents indicating that these characteristics were very important. It is also important to note that 42% of respondents indicated that bicycle access was very important to them, while 41% indicated that automobile parking was very important.

Respondents indicated that the presence of a concession stand and the type of turf used (natural grass or artificial) were less important characteristics.

Table C-18. Importance of Sports Field Characteristics

Characteristics	Average Score
Good value for the money/affordable	4.3
Fields/grounds are clean	4.3
Instructors and coaches are friendly	4.2
Has a good reputation	4.2
Available for use year round	4.1
Variety of sports/leagues available	3.9
Ease of automobile parking	3.9
Ease of bicycle/pedestrian access	3.9
Close to home/work (i.e. less than 5 minutes)	3.6
Membership is diverse	3.5
Has bleachers	3.5
Field turf is natural (grass)	3.3
Located near a school	3.2
Has a concession stand	3.0
Field turf is artificial	2.6
Other (Please specify)	2.2

Source: Canby Community Center and Sports Field Complex Survey, CPW, 2009

FUTURE SPORTS FIELD USE

The purpose of this section was to assess the demand and level of future use for the proposed sports field complex.

Question 19: Would you or someone in your household use a sports field built in the Canby area if it offered a broad range of activities and programs?

Nearly 37% of respondents indicated that they or someone in their household would use the sports field complex. Of those who indicated that they would use the field, 76% indicated that that they would use it for youth sports, while 55% recorded that they would use the field for adult sports. A higher percentage (49%) of respondents indicated that they would not use the facility. The most common reason provided for not using the field was lack of participation in field sports (see Table C-19). It is also interesting to note that respondents consistently associated field sports with children, which may provide an opportunity to expand adult sport leagues and activities in the Canby area.

Table C-19. Reasons for Not Using Sports Field Complex

Comment	Count	Frequency
Do not participate in field sports	12	High
No children	7	Medium
Age	6	
Use other facilities	3	Low
Lack of interest	3	
Cost	1	

Source: Canby Community Center and Sports Field Complex Survey, CPW, 2009

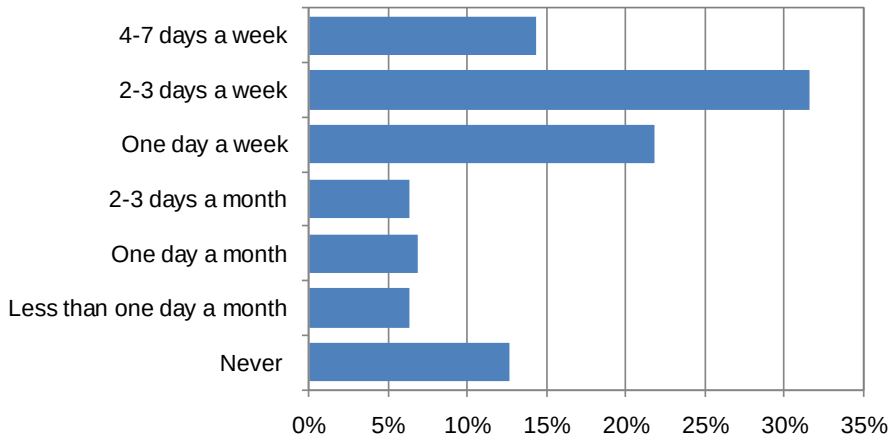
Nearly 14% of respondents indicated that they were unsure if they would use the sports field complex. Again, comments regarding children were most common. One respondent wrote, “If my

son decided to be in sports again, he is eleven and may want to be in a team again in the future." Additionally, comments regarding the types and costs of activities offered were also recorded.

Question 20: How often on average do you think you or members of your household would you use such a facility?

Figure C-11 shows the anticipated frequency of facility use for respondents who indicated that they would use the facility. Nearly 68% of respondents recorded that they would use the facilities at least once a week, with about 46% indicating they would use it at least twice a week. This suggests that respondents willing to participate in field sports would utilize the facility on a regular basis.

Figure C-11. Anticipated Frequency of Sports Field Use



Source: Canby Community Center and Sports Field Complex Survey, CPW, 2009

Question 21: If a sports field provided opportunities to join a league or sports team, would you or someone in your household be interested in participating?

Responses to this question were split almost evenly, with 48% of respondents indicating that they would take advantage of league sport opportunities and 52% reporting that they would not. Respondents willing to participate in leagues recorded soccer as the sport of choice. Softball, baseball, and football also received large response rates. Swimming, ping pong, and frisbee all received a minimal response, indicating that leagues for these sports are not in demand.

Table C-20. Preferred Leagues for Field Sports

Sport	Percentage
Soccer	27%
Softball	14%
Baseball	13%
Football	10%
Basketball	8%
Other	14%
Lacrosse	3%
Tennis	3%
Volleyball	3%
Track & field	2%
Badminton	1%
Frisbee	1%
Ping pong	1%
Swimming	1%

Source: Canby Community Center and Sports Field Complex Survey, CPW, 2009

FACILITY SITING AND FUNCTION

This section collected information about respondents' preference for the location and function of the proposed facilities.

Question 23: Should the City of Canby/CAPRD explore partnerships with other entities (such as the School District) to determine the location of a potential community center?

The majority (53%) of respondents indicated that they supported the use of a partnership to determine the location of the proposed community center. Of these respondents, most suggested that the Canby school district should be involved. Other stakeholders that were seen as important include the business community, the Canby Kids program, and the YMCA.

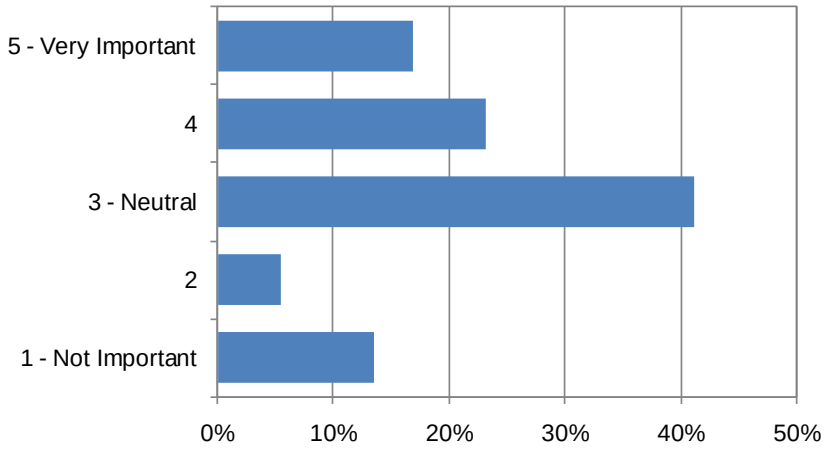
Question 24: Would you be more likely or less likely to support a community center or sports field if it were developed as a partnership?

Most respondents (59%) indicated that they were neutral when asked this question. However, 32% of respondents indicated that they would be more likely to support the community center if a partnership was established, while only 9% reported that a partnership would lessen their support. This suggests that creating a partnership for developing the proposed community center is a favorable option.

Question 25: How important to you is it that a potential community center be located in or near downtown Canby?

Surprisingly, a large number of respondents (41%) stated that they were indifferent to whether or not the community center was located in downtown Canby. It is important to note, however, that nearly twice as many respondents supported the center being located downtown compared to those who felt that the central location was not important (see Figure C-12).

Figure C-12. Importance of Community Center Being Located Downtown



Source: Canby Community Center and Sports Field Complex Survey, CPW, 2009

Question 26: How important to you is it that a potential community center is located next to sports fields?

This question received almost an identical response as the previous question, with 47% of respondents indicating that they were neutral about the center's location near a sports field. However, 36% of respondents reported that having the center near a sports field was important to them.

Question 27: What do you think the sports field should function as? (check all that apply)

A majority of respondents (68%) indicated that the sports field should serve as an open space for general use (see Table C-17). Use as both a tournament and an overflow venue also received a high frequency of responses. Using the field for professional league or championship playoffs received the lowest response, with 24% of respondents reporting this as a desired function of the sports field.

Table C-21. Preferred Function of Sports Field Complex

Use	Percentage
As open space for general use	68%
As a tournament venue for Canby sports to hold tournaments for fund raising	57%
As an overflow location to supplement existing outdoor sports fields	54%
As a venue to increase tourism and build local businesses	43%
As a tournament venue for non Canby leagues/sports to rent	39%
As a tournament venue for regional or national scale events	36%
As a new location for Canby outdoor sports leagues, leaving currently used fields	32%
As a venue for professional league or championship playoffs	24%

Source: Canby Community Center and Sports Field Complex Survey, CPW, 2009

IMPLICATIONS

The Community Planning Workshop used the information from this household survey to guide the facility concept and recommendations for our report to the City of Canby. This information can be found in Chapters 2 and 6 of the Canby Community Center and Sports Field Complex Market Assessment and Feasibility Analysis Report.

Canby Area Parks and Recreation District In-door Community Center and Out-door Sports Field Complex Survey

Greetings:

Your household has been randomly selected to participate in this survey about the potential for an indoor community center and outdoor sports field complex in the Canby area. This questionnaire should be filled out by an adult in the household, someone 18 years of age or older. This person should answer questions for **all** members of the household. If a particular question does not apply to you, simply skip to the next question or section. **All responses will be kept anonymous.**

First, we want to ask about your recreation or exercise activities

Q-1 Which of the following recreation or exercise activities have you or members of your household participated in during the last 12 months (Check all that apply):

- ❑ Aerobics
- ❑ After school programs
- ❑ Aquatics
- ❑ Arts & Crafts
- ❑ Baseball
- ❑ Basketball
- ❑ Biking
- ❑ Bowling
- ❑ Boxing/Martial Arts
- ❑ Dance
- ❑ Equestrian
- ❑ Football
- ❑ Frisbee (Ultimate, Golf)
- ❑ Golf
- ❑ Gymnastics
- ❑ Horseshoes
- ❑ Indoor Soccer
- ❑ Lacrosse
- ❑ Marathon/triathlon
- ❑ Parent/Child programs
- ❑ Performing Arts
- ❑ Pilates
- ❑ Racquetball
- ❑ Rock climbing
- ❑ Rowing (incl. machines)
- ❑ Running/Jogging
- ❑ Rugby
- ❑ Senior activities
- ❑ Skateboarding
- ❑ Soccer
- ❑ Softball
- ❑ Squash
- ❑ Strength and flexibility
- ❑ Swimming (laps)
- ❑ Swimming (lessons)
- ❑ Tennis
- ❑ Track and field
- ❑ Treadmill/Stair machine
- ❑ Volleyball
- ❑ Walking
- ❑ Water Aerobics
- ❑ Weight training
- ❑ Wrestling
- ❑ Yoga/Tai Chi
- ❑ Other (Please specify)

_____
_____
_____

Q-2 Please list the three recreation or exercise activities you or your household members participate in most often (please include participant's age). Then, ESTIMATE the number of days of participation per year.

For example: 1.____Soccer_____(Age 12) for _____12___ days per year

1._____ for _____ days per year

2._____ for _____ days per year

3._____ for _____ days per year

Q-3 Have you or any members of your household participated in a sports team/league in the previous year?

- ❑ No – **Skip to Q4**
- ❑ Yes If Yes, what sport(s)? **Youth:**

Adult:

How much did your household spend, on average**,** on team/league registration(s) last year?

- ❑ Below $50
- ❑ $51 - $100
- ❑ $101 - $150
- ❑ $151 - $200
- ❑ $201 - $250
- ❑ $251 - $300
- ❑ More than $300

Q-4 On average, how often do you or members of your household engage in recreation or exercise activity?

- ❑ Less than once a month
- ❑ Once a month
- ❑ 2-3 times a month
- ❑ One day a week
- ❑ 2-3 days a week
- ❑ 4-5 days a week
- ❑ 6-7 days a week
- ❑ Don't Know

Q-5 How satisfied are you with the opportunities to recreate or exercise in and around the City of Canby? (circle one)

Very Satisfied		Neutral		Very Dissatisfied
5	4	3	2	1

Now, tell us about recreation or exercise facilities you use.

Q-6 What type(s) of facilities do you or members of your household use for recreation or exercise? (Please check all that apply.)

- ❑ Public parks
- ❑ Public schools
- ❑ Canby swim center
- ❑ Canby adult center
- ❑ Grange
- ❑ Religious facility
- ❑ Great outdoors
- ❑ Private residence
- ❑ Business (i.e. employer) owned facility
- ❑ Private health club/Fitness facility
- ❑ YMCA facility
- ❑ Other

Q-7 Do you or members of your household belong to or use indoor recreation or exercise facilities that are outside of Canby area?

- ❑ Yes Where is the primary facility you use located? _____ (City)
- ❑ No

Q-8 On average, how often do you or members of your household use an indoor recreation or exercise facility?

- ❑ Less than once a month
- ❑ Once a month
- ❑ 2-3 times a month
- ❑ One day a week
- ❑ 2-3 days a week

The City of Canby and its partners are evaluating community desire for a community center and set of sports fields located in Canby. We address community center characteristics and facilities in the first section followed by sports field characteristics and facilities in the section that follows.

In this section we'd like to know how important various **community center** characteristics are to you and your household members

Q-9 Please circle the number that best indicates the level of importance for each of the following **community center facility categories** and the specific **activities/programs** that follow. (5=Very important, 1=Not important)

	Very Important				Not Important
Year-Round In-door Aquatic Center	**5**	**4**	**3**	**2**	**1**
Children's swimming (open/lessons)	5	4	3	2	1
Water slide/Lazy River	5	4	3	2	1
Lap swimming for adults	5	4	3	2	1
Senior water exercise	5	4	3	2	1
Adult swim classes	5	4	3	2	1
Diving	5	4	3	2	1
Swim team	5	4	3	2	1
Masters swim team	5	4	3	2	1
Special programs (jacuzzi/therapy/sauna)	5	4	3	2	1
Other (please specify_____)	5	4	3	2	1

	Very Important				Not Important
Indoor Athletic Activities	**5**	**4**	**3**	**2**	**1**
Drop-in basketball	5	4	3	2	1
Weight training equipment	5	4	3	2	1
Indoor track	5	4	3	2	1
Indoor soccer	5	4	3	2	1
Gymnastics	5	4	3	2	1
Tennis classes	5	4	3	2	1
Martial Arts	5	4	3	2	1
Aerobics classes	5	4	3	2	1
Youth sports	5	4	3	2	1
Volleyball	5	4	3	2	1
Badminton	5	4	3	2	1
Wrestling	5	4	3	2	1
Ping pong	5	4	3	2	1
Rock climbing	5	4	3	2	1
Other (please specify _____)	5	4	3	2	1

	Very Important				Not Important
Multi-Purpose Activity Center	**5**	**4**	**3**	**2**	**1**
Music	5	4	3	2	1
Crafts	5	4	3	2	1
Dances	5	4	3	2	1
Games (arcade/billiards/pool table)	5	4	3	2	1
Large meeting space(s)/event center	5	4	3	2	1
Small meeting space(s)/classrooms	5	4	3	2	1
Parenting/Community classes	5	4	3	2	1

	Very Important				Not Important
Special Courts/Facilities	**5**	**4**	**3**	**2**	**1**
Racquetball	5	4	3	2	1
Handball	5	4	3	2	1
Other (please specify _____)	5	4	3	2	1
Other (please specify _____)	5	4	3	2	1

	Very Important				Not Important
Support Space/Facility	**5**	**4**	**3**	**2**	**1**
Kitchen	5	4	3	2	1
Lobby/Check in area	5	4	3	2	1
Locker room	5	4	3	2	1
Shower room	5	4	3	2	1
Storage	5	4	3	2	1
Snack/Juice Bar	5	4	3	2	1
Childcare facility	5	4	3	2	1
Other (please specify _____)	5	4	3	2	1

Q-10 Please indicate the importance of the following **community center facility characteristics** on a scale of 1 to 5 (Circle the appropriate number—5=Very important, 1=Not important)

Characteristic	Very Important				Not Important
Close to home/work (i.e., less than 5 minutes)	5	4	3	2	1
Close to downtown (i.e., less than 5 minutes)	5	4	3	2	1
Close to schools/parks (i.e., less than 5 minutes)	5	4	3	2	1
Close to sports fields (i.e., less than 5 minutes)	5	4	3	2	1
Has a good reputation	5	4	3	2	1
Facility is clean	5	4	3	2	1
Membership is diverse	5	4	3	2	1
Ease of automobile parking	5	4	3	2	1
Ease of bicycle/pedestrian access	5	4	3	2	1
Instructors and staff are friendly	5	4	3	2	1
Variety of programs available	5	4	3	2	1
Childcare is available	5	4	3	2	1
There are plenty of staff members to help me	5	4	3	2	1
Good value for the money/affordable	5	4	3	2	1
Equipment is always working properly	5	4	3	2	1
Doesn't smell like a gym	5	4	3	2	1
Hours of operation	5	4	3	2	1
Green building materials	5	4	3	2	1
Other (Please specify)	5	4	3	2	1

Q-11 Would you or members of your household use an indoor community center built in the Canby area if it offered a broad range of activities and programs?

- ❑ Yes
- ❑ No **- SKIP to Q-17** Why not? _____
- ❑ It depends – please explain _____

Q-12 How often do you think you or members of your household would you use an indoor community center built in the Canby area?

- ❑ 4-7 days a week
- ❑ 2-3 days a week
- ❑ One day a week
- ❑ 2-3 days a month
- ❑ One day a month
- ❑ Less than one day a month
- ❑ Never

Q-13 Which of the following community center **programs and facilities** do you expect you or members of your household would attend or use? (Check all that apply)

- ❑ Aquatics classes
- ❑ Arts/crafts classes
- ❑ Audio/Visual equipment
- ❑ Conference/meeting room
- ❑ Climbing wall
- ❑ Court sports (basketball, racquetball, tennis etc.)
- ❑ Dance studio
- ❑ Drop-in child care
- ❑ Fitness classes
- ❑ Fitness equipment
- ❑ Indoor track
- ❑ Kitchen facilities
- ❑ League/team sports
- ❑ Locker/shower rooms
- ❑ Parent-child classes
- ❑ Playground
- ❑ Recreation program for disabled
- ❑ Recreation program for elderly
- ❑ Recreation program for youth/children
- ❑ Recreation program for young and middle aged adults
- ❑ Sauna
- ❑ Senior fitness/exercise
- ❑ Swimming pool
- ❑ Water slide
- ❑ Weight room
- ❑ Whirlpool/jacuzzi
- ❑ Weight training classes
- ❑ Youth sports/activities
- ❑ Other (Please specify) _____ _____

Q-14 Please estimate how long **per average visit** individual household members would use the community center?

- ❑ Less that 30 minutes
- ❑ 30-60 minutes
- ❑ 1-2 hours
- ❑ More than 2 hours
- ❑ Don't know

Q-15 How much would you or members of your household be willing to pay to use a community center on **a per visit** basis, both **per person** and **per household**?

$_____**per person/visit** $_____**per household/visit**

Q-16 Would you or members of your household take advantage of monthly community center memberships if they were available?

❑ Yes **If yes**, how much would you be willing to pay for **monthly** membership fees, both **per person** and **per household**?

$_____**per person/month** $_____**Per household/month**

❑ No

Now, we want to ask about how important various **outdoor sports field characteristics** are to you and your household members.

Q-17 Please circle the number that best indicates the level of importance for each of the following **sports field facility activities / programs**. (5=Very important, 1=Not important)

Field Type	Very Important				Not Important
Soccer	5	4	3	2	1
Football	5	4	3	2	1
Softball/Baseball	5	4	3	2	1
Ultimate Frisbee	5	4	3	2	1
Lacrosse	5	4	3	2	1
Other (please specify)_____	5	4	3	2	1

Q-18 Please indicate the importance of the following **sports field facility characteristics** on a scale of 1 to 5 (Circle the appropriate number—5=most important, 1=least important)

Characteristic	Very Important				Not Important
Close to home/work (i.e. less than 5 minutes)	5	4	3	2	1
Has a good reputation	5	4	3	2	1
Fields/grounds are clean	5	4	3	2	1
Membership is diverse	5	4	3	2	1
Ease of automobile parking	5	4	3	2	1
Ease of bicycle/pedestrian access	5	4	3	2	1
Instructors and coaches are friendly	5	4	3	2	1
Variety of sports/leagues available	5	4	3	2	1
Field turf is natural (grass)	5	4	3	2	1
Field turf is artificial	5	4	3	2	1
Good value for the money/affordable	5	4	3	2	1
Located near a school	5	4	3	2	1
Available for use year round	5	4	3	2	1
Has a concession stand	5	4	3	2	1
Has bleachers	5	4	3	2	1
Other (Please specify) _____	5	4	3	2	1

Q-19 Would you or someone in your household use a sports field built in the Canby area if it offered a broad range of activities and programs?

- ❑ Yes, for ❑ Youth sports ❑ Adult sports
- ❑ No **- SKIP to Q-23** Why not? _____
- ❑ It depends – please explain _____

Q-20 How often on average do you think you or members of your household would you use such a facility?

- ❑ 4-7 days a week
- ❑ 2-3 days a week
- ❑ One day a week
- ❑ 2-3 days a month
- ❑ One day a month
- ❑ Less than one day a month
- ❑ Never

Q-21 If a sports field provided opportunities to join a league or sports team, would you or someone in your household be interested in participating?

- ❑ Yes Sport_____ # of Seasons_____
- ❑ No

Q-22 If you answered **YES** to Question 21 above, in the table below please list up to five league or team sports you or members of your household would participate in, the number of seasons you would plan and how much you would pay per season for registration fees.

Sport	# of Seasons	Fee/Season
EXAMPLE: Soccer	*4*	*$75*
		$
		$
		$
		$
		$

Next, some questions about facility location/siting and function.

Q-23 Should the City of Canby/CAPRD explore partnerships with other entities (such as the School District) to determine the location of a potential community center?

❑ Yes If yes, which entity(ies) should be involved? _____
❑ No

Q-24 Would you be more likely or less likely to support a community center or sports field if it were developed as a partnership? (circle one)

More Likely		Neutral		Less Likely
5	4	3	2	1

Q-25 How important to you is it that a potential community center be located in or near downtown Canby? (circle one)

Very Important		Neutral		Not Important
5	4	3	2	1

Q-26 How important to you is it that a potential community center be located next to sports fields? (circle one)

Very Important		Neutral		Not Important
5	4	3	2	1

Q-27 What do you think the sports field should function as? (check all that apply)

- ❑ As a new location for Canby outdoor sports leagues, leaving currently used fields
- ❑ As an overflow location to supplement existing outdoor sports fields
- ❑ As a tournament venue for Canby sports to hold tournaments for fund raising
- ❑ As a tournament venue for non Canby leagues/sports to rent
- ❑ As a tournament venue for regional or national scale events
- ❑ As a venue for professional league or championship playoffs
- ❑ As open space for general use
- ❑ As a venue to increase tourism and build local businesses

Finally, we would appreciate any information you are willing to share with us about you and your household. This information will remain confidential and is for survey comparison purposes only.

Q-28 Including yourself, how many persons are in your household:

Under 18_____? 18-65_____? Over 65_____?

Q-29 What is your age? _____

Q-30 What is your gender? ❑ Female ❑ Male

Q-31 What city or community do you live in (or are you closest to)?

City:_____ Zip:_____ (❑ Within Canby City Limits)

Q-32 How long have you lived in or near Canby? _____ Years

Q-33 What is the highest level of education that you have completed?

❑ Grade School
❑ Some High School
❑ High School/GED
❑ Some College
❑ College Graduate
❑ Post Graduate Work

Q-34 Please indicate your current employment status (check all that apply).

❑ Employed Full Time
❑ Employed Part-Time
❑ Homemaker
❑ Student
❑ Unemployed
❑ Self-Employed
❑ Retired
❑ Other _____

What city do you work in (or go to school)? _____

Q-35 Please indicate which of the following categories best describes your total household income, before taxes, in 2008.

❑ Less than $10,000
❑ $10,000-$19,999
❑ $20,000-$29,999
❑ $30,000-$39,999
❑ $40,000-$49,999
❑ $50,000-$59,999
❑ $60,000-$74,999
❑ $75,000-$99,999
❑ $100,000-$149,999
❑ $150,000 or more

Q-36 Where do you receive information regarding local activities and events? (check all that apply)

❑ Community newsletter
❑ School newspaper
❑ Organizations brochure
❑ Local newspaper(s)
❑ Daily newspaper(s)
❑ Radio
❑ Television
❑ Internet
❑ From friends and neighbors
❑ Other

Please share any other comments or ideas you have regarding a potential community center and sports field in Canby below.

Thank you for completing this survey!

TRANSCRIPT OF WRITTEN COMMENTS

This appendix lists all of the open-ended comments provided by survey respondents. The comments below are recorded as they were written and may contain spelling and grammatical errors.

Question 6

What type(s) of facilities do you or members of your household use for recreation or exercise?

Responses

- Archery range
- Canby bike path
- Canby bowling
- Canby fairgrounds
- Canby Kids
- Canby Youth Baseball Fields
- Child dance school
- Clackamas Co. Fairgrounds
- Community Center at Hope Village
- Dance studios & ballrooms, skating rinks
- Elks Lodge gym
- Fairground riding arena
- Golf course
- Gymnastics
- Home gym
- Hope Village exercise room
- Metro Gymnastics
- Molalla State Park, Oregon Garden
- Neighborhood
- No aquatic park
- Public golf course
- Racquetball facility (Pay n' Go)
- Retirement Center
- School
- School/college classes
- Senior Center
- Skate parks
- Walking road
- WVCC

Question 11

Would you or members of your household use an indoor community center built in the Canby area if it offered a broad range of activities and programs?

Responses

- No - Why not?
- Age & heart condition & money involved
- Because of age
- Because the outdoors is usually mild

- Don't ever do those things
- Don't use them now
- Health reasons
- I only have time for water exercise
- Life is already full - no time
- No interest
- Probably not - creatures of habit & our habit is not to engage in public athletic/recreational activities J
- Time issues, other interests
- Too much tax money
- Too old
- Walking works for us
- We are opposed to the use of community money derived from taxes for this purpose. Prefer funding by private sector with fees charged for use of facility, or use of existing buildings/organizations such as schools, churches, etc.
- We live 10 miles from Canby, and prefer the outdoors
- We stay active and fit independently
- It depends – please explain:
- $
- Activity interest at that time
- Can we afford it in this economyu? These things always cost more than they seem to be worth.
- Canby is out of our normal daily life "area"
- Cost & availability
- Cost & programs
- Costs, days/hours
- Depends on cost to what we use
- How many programs for senior citizens
- How much and where it would be
- How much it cost taxpayers
- If it offered activities we are interested in. Also, if affordable and well managed.
- If on the north side near Fred Meyer area
- If the activities suit us
- It probably would not serve our needs because it would be multi-use & centered to family general use
- My age restricts some activities, but there should be lots of activities available for the community
- My interest to pursue an activity at the time it is offered
- On cost
- On prices and what was offered and at what times
- On what activities were offered
- Price
- Pricing & activities
- Probably for meetings or classes. Not sure what will be offered.
- The affordability
- The cost, we have 4 kids & this is always a factor
- Variety or programs, family friendly, not too crowded

- We already have one
- Weights, badminton courts
- What they offered

Question 19

Would you or someone in your household use a sports field built in the Canby area if it offered a broad range of activities and programs?

Responses

- No - Why not?
- Age
- Age & health
- Age! 42 to 63
- Children nearly all out of the house or don't play such sports
- Don't do field sports
- Don't have children at home. We don't do any of those activities
- Don't like to join teams
- Don't need it
- Don't play field sports
- Fire Mark Adcock
- Have school sports field
- Just lack of interest
- Kids are getting older & do more indoors
- No grandchildren living close to watch
- No interest
- No time, too old
- No young children in our family
- Not active
- Not as interested or available for outdoor activities
- Not interested in those activities
- Not into field sports
- Not into group sports/games
- Not needed
- Not on a team
- Not the sporty type
- Other interests
- Our activities do not require a sports field
- Roo much tax money!
- Too far away
- Too old
- Too old for us, our grandchildren are too young
- Use private club for outdoor activities
- We are 75 yrs old, we would be spectators though
- We don't have children & we don't participate in field sports
- We don't participate in team sports
- We don't tend to play sports
- Age of activities (members)

- Children are currently very young - perhaps in future
- Coaching a youth team
- Health
- If it had activities we were interested in and affordable
- If my child wanted to play sports
- If my son decided to be in sports again. He is 11 & may want to be in a team again in the future.
- If our home school sports leagues would be able to use the space
- If we were sporty
- Maybe
- Mostly interested in softball
- Not positive
- Walking track
- We have not been in teams before
- We'd like it for experience
- What the adult sport would be
- (blank)

Question 23

Should the City of Canby/CAPRD explore partnerships with other entities (such as the School District) to determine the location of a potential community center?

If yes, which entity(ies) should be involved?

Responses

- All local gov't/voters
- All schools
- All!
- Businesses
- Camby Bus. leadership program
- Canby Kids & other sports groups
- Canby Kids needs s/b addressed
- Canby Kids, school district, club sports, Kiwanis
- Canby Kids/school district
- Canby School Dist
- Canby school district
- Canby School District, Canby Kids
- Canby school district, maybe police (safest area)
- CAPRD
- Churches
- City, school district, other entities that would benefit
- Counties/state/school dist. & federal stimulus funds
- CSD
- Doesn't matter to me, as long as the correct/best location is picked
- Elementary schools
- Fire Mark Adcock
- High school teams
- Hubbard/Molalla/Aurora
- Kaiser medical senior plan
- Local school districts, The Canby Center, local churches
- More diverse opinions
- N. Clackamas parks, Canby Swim Ctr
- Park & rec/Canby Livability
- Park district, school district
- Private sponsorship
- PTA
- Sch. District
- School
- School dist
- School dist, businesses
- School dist, Canby Kids, Senior Center

- School dist, City of Canby
- School dist, local businesses
- School dist, planning dept, youth recreation groups, adult rec.
- School dist, YMCA?
- School dist.
- School district
- School district, Canby Kids
- School district, communit6y youth pastors
- School district, library district, & Canby Adult Center
- School district, local churches
- School district, private funding
- School district, share facilities
- School district/public
- School districts, Canby senior center, aquaticsa center, Canby Kids
- School Districty CSC
- School, community
- School, senior center
- School, YMCA
- Schools
- Schools - swim facility, etc. in conjunction to PE classes
- Schools & churches
- Schools & parks
- Schools & rec. district
- Schools, businesses, county, state
- Schools, local businesses
- Schools, senior center
- Schools, senior center, local churches
- Sr. center
- The people of Canby
- Unknown
- Wilsonville, Oregon city, Mulino, Hubbard
- WVCC (Willamette Valley CC)
- YMCA/YWCA, colleges, community)

APPENDIX D: REVIEW OF COMPARABLE FACILITIES

This appendix presents information CPW gathered on comparable community center and sports field facilities. The review of comparable facilities allows analysis of characteristics of contemporary facilities, including amenities, programs, visitation, revenues, and expenses. While this information alone cannot be used to determine the financial feasibility of a community center in the Canby/CPRD area, it does provide general information on how similar facilities operate and what makes them successful.

METHODS

CPW used a number of criteria to identify comparable facilities for review. Key criteria included: facilities that were built within the last ten years, are located within the Pacific Northwest, and contain similar design features as the proposed Canby community center (i.e. swimming pools, athletic equipment, etc.). CPW developed a brief questionnaire that captured detailed information about each comparable facility and conducted telephone interviews with staff from each facility. We reviewed the following five facilities:

East Portland Community Center, Portland, Oregon.

- Acquired in 1998 on 5.7 acres in southeast Portland, aquatic center added in 2008

Federal Way Community Center, Federal Way, Washington

- Constructed in 2007 on 10 acres

Lincoln City Community Center, Lincoln City, Oregon

- Opened in 1979 on 3 acres, expanded and renovated in 2004

Southwest Portland Community Center, Portland, Oregon

- Opened in 1999, paid for by a bond, located in the Mapleton Neighborhood

Sherwood YMCA, Sherwood, Oregon

- Opened in 1998 on 5 acres, expanded in 2003

EAST PORTLAND COMMUNITY CENTER, PORTLAND, OR

740 SE 106th Ave, Portland, OR 97216

Website: www.portlandonline.com/parks/finder/index.cfm?PropertyID=104&action=ViewPark

Amenities

15,000 ft^2 aquatic center with several 'green' features, lap pool, basketball courts, fitness room, gym, meeting room, kitchen, party room, rock climbing wall, weight room, family changing room.

Programming

- Family nights
- Preschool programs
- Personal trainers
- Exercise classes
- Open swim
- Swim lessons
- Teen events
- Cooking classes
- Art classes
- Youth sports, including swimming, soccer, gymnastics, etc.
- Music lessons
- Fencing
- Senior programs
- Tae kwon do
- Tai chi

FEDERAL WAY COMMUNITY CENTER, FEDERAL WAY, WA

876 S. 333rd St., Federal Way, WA 98003

Website: www.cityoffederalway.com/Page.aspx?page=1179

Amenities

Six lane lap pool, diving board, leisure pool, three gyms, steam room, multipurpose rooms, walking/jogging track, senior lounge, kitchen, aerobics studio, weight room.

Programming

- Group fitness classes
- Open swim/laps
- Swim lessons
- Climbing pinnacle
- Tennis lessons
- Personal trainers
- Leagues (basketball, dodgeball, volleyball, softball, soccer)
- Senior programs
- Wedding/event rentals
- Community rooms
- After-school camps

LINCOLN CITY COMMUNITY CENTER, LINCOLN CITY, OR

2150 NE Oar Place, Lincoln City, OR

Website: www.lincolncity.org/CityDepartments/ParksRecreation/tabid/1947/Default.aspx

Amenities

Aquatic center, diving boards, spa (in process), rock climbing wall, gymnasium, meeting rooms, senior center, nearby outdoor sports fields.

Programming

- Sports leagues (soccer, volleyball, basketball)
- Preschool programs
- Swim lessons
- Senior programs
- Tai Chi
- Fitness classes
- After-school programs and camps
- Middle school cross country
- Dance classes
- Personal trainers

SHERWOOD YMCA, SHERWOOD, OR

23000 SW Pacific Highway, Sherwood, OR

Website: www.ymca-sherwood.org/sherwood.html

Amenities

Aquatic center, gym, meeting rooms, weight room, cardio room, snack bar, childcare facility, outdoor playground, senior center, teen center, aerobic studios

Programming

- Swim lessons
- Water fitness classes
- Lifeguard training
- After-school programs
- CPR training
- Babysitter's training
- Dance classes
- Birthday parties
- Leagues (basketball, soccer, volleyball)
- Karate
- Tai Chi
- Massage therapy
- Nutrition counseling
- Personal trainers
- Senior classes
- Group fitness classes

SOUTHWEST PORTLAND COMMUNITY CENTER, PORTLAND, OR

6820 SW 45th Ave, Portland, OR

Website: www.portlandonline.com/parks/finder/index.cfm?PropertyID=1132&action=ViewPark

Amenities

Aquatic center, lap pool, exercise studio, double court gym, childcare center, multipurpose room with kitchen, party rooms, watershed resource center, kitchen, party room, outdoor courtyard

Programming

- Preschool classes
- Winter break camps
- Family fun nights
- Craft and cooking classes
- Language classes
- Sports leagues (basketball, soccer)
- Tae Kwon Do
- Babysitter's training
- Skateboard lessons
- Young adult training classes
- Private tutoring
- Parenting classes
- Swim lessons
- Water workouts
- Birthday parties
- Personal trainers
- Yoga
- Tai Chi
- Pilates
- Adult fitness classes

APPENDIX E. FEE SCHEDULES

This appendix presents 2009 fee structures from the following comparable facilities:

- Lincoln City Community Center – Lincoln City, Oregon
- Southwest Portland Community Center – Portland, Oregon
- East Portland Community Center – Portland, Oregon
- Federal Way Community Center, Federal Way, Washington
- Sherwood YMCA – Sherwood, Oregon

Note that each facility has a variety of pricing options including drop-in admission, multiple trip passes, monthly memberships, and annual memberships. Additionally, all the facilities studied for this report offer resident discounts.

LINCOLN CITY COMMUNITY CENTER – LINCOLN CITY, OREGON

Table E-1. Drop-in Admission Rates

	Standard Rate	Resident Discount Rate
Youth (under 18)	$1.75	$1.75
Adult	$3.50	$2.75
Senior (60+)	$3.25	$2.25

Source: Lincoln City Community Center, 2009

Note: The standard rate is charged to all individuals not living with Lincoln City's city limits

Table E-2. Ten-Use Pass Rates

	Standard Rate	Resident Discount Rate
Youth (under 18)	$15.75	$15.75
Adult	$31.50	$24.75
Senior (60+)	$29.25	$20.25

Source: Lincoln City Community Center, 2009

Table E-3. Standard Membership* Rates

	Standard Rate		Resident Discount Rate	
	3 Month	**Annual**	**3 Month**	**Annual**
Youth	$44.50	$134.50	$44.50	$134.50
Adult	$65	$193	$48	$145
Senior	$51	$153	$39	$116
Family	$145	$433	$109	$326

Source: Lincoln City Community Center, 2009

Note: Family is defined as two adults and two children or one adult and three children living in the same household. Each additional household member is $8 and each non-resident child member is $15.
*Standard Membership includes use of either the Aquatic Center or Lifestyle Center

Table E-4. Premium Membership* Rates

	Standard Rate		Resident Discount Rate	
	3 Month	**Annual**	**3 Month**	**Annual**
Youth	$50	$152	$50	$152
Adult	$97	$289	$71	$217
Senior	$77	$230	$59	$173
Family	$217	$669	$164	$489

Source: Lincoln City Community Center, 2009

*Premium Membership includes use of both the Aquatic Center and Lifestyle Center

Table E-5. Rock Climbing Wall Rates

	Standard Rate	**Resident Discount Rate**
Youth (under 18)	$3.50	$3.50
Adult	$6.25	$5.00

Source: Lincoln City Community Center, 2009

Table E-6. Shower and Towel Rental Rates

	Standard Rate	**Resident Discount Rate**
Shower	$3.50	$2.00
Towels Rental	$1.50	$1.50

Source: Lincoln City Community Center, 2009

Table E-7. Locker Rental Rates

	3 Month	Annual
Small Locker	$15.00	$50.00
Large Locker	$17.00	$57.00

Source: Lincoln City Community Center, 2009

SOUTHWEST PORTLAND COMMUNITY CENTER – PORTLAND, OREGON

Table E-8. Drop-in Admission Rates

	General Admission
Toddlers (0-2 yrs)	Free
Children (3-12 yrs)	$3.25
Teens (13-17 yrs)	$4.75
Adults (18-59 yrs)	$6.50
Seniors (60+)	$4.75

Source: Southwest Portland Community Center, 2009

Table E-9. 10-Use Pass Rates

	Standard Rate	Resident Discount Rate
Toddlers (0-2 yrs)	Free	Free
Children (3-12 yrs)	$30	$28
Teens (13-17 yrs)	$42	$35
Adults (18-59 yrs)	$60	$50
Seniors (60+)	$42	$35

Source: Southwest Portland Community Center, 2009

Table E-10. 20-Use Pass Rates

	Standard Rate	Resident Discount Rate
Toddlers (0-2 yrs)	Free	Free
Children (3-12 yrs)	$56	$46
Teens (13-17 yrs)	$74	$61
Adults (18-59 yrs)	$106	$88
Seniors (60+)	$74	$61

Source: Southwest Portland Community Center, 2009

Table E-11. Memberships Rates

	Standard Rate		Resident Discount Rate	
	3 Month	**Annual**	**3 Month**	**Annual**
Toddlers (0-2 yrs)	Free	Free	Free	Free
Children (3-12 yrs)	$110	$329	$91	$272
Teens (13-17 yrs)	$150	$457	$124	$378
Adults (18-59 yrs)	$206	$616	$170	$509
Seniors (60+)	$150	$457	$124	$378
Families		$893		$738

Source: Southwest Portland Community Center, 2009
Note: Family is defined as four members with up to two adults

Table E-12. Facility Rental Rates

	Weekend Rental	**Weekday Rental**
1-15 Guests	$60/hr per room	$25/hr per room
16-30 Guests	$80/hr per room	$25/hr per room
31-75 Guests	$135/hr for 2 rooms	$25/hr per room

Source: Southwest Portland Community Center, 2009
Note: Rates are for multi-purpose and poolside rooms

EAST PORTLAND COMMUNITY CENTER – PORTLAND, OREGON

Table E-13. Drop-in Admission Rates

	General Admission
Toddlers (0-2 yrs)	Free
Children (3-12 yrs)	$3.00
Teens (13-17 yrs)	$4.00
Adults (18-59 yrs)	$5.00
Seniors (60+)	$4.00

Source: East Portland Community Center, 2009

Table E-14. Twenty-Use Pass Rates

	Standard Rate	Resident Discount Rate
Toddlers (0-2 yrs)	Free	Free
Children (3-12 yrs)	$52	$42
Teens (13-17 yrs)	$66	$55
Adults (18-59 yrs)	$88	$74
Seniors (60+)	$66	$55

Source: East Portland Community Center, 2009

Table E-15. Membership Rates

	Standard Rate		Resident Discount Rate	
	3 Month	Annual	3 Month	Annual
Toddlers (0-2 yrs)	Free	Free	Free	Free
Children (3-12 yrs)	$90	$318	$75	$225
Teens (13-17 yrs)	$108	$342	$90	$288
Adults (18-59 yrs)	$144	$468	$120	$390
Seniors (60+)	$108	$342	$90	$288
Families		$893		$738

Source: East Portland Community Center, 2009
Note: Family is defined as four members with up to two adults

Table E-16. Swim Lesson Rates

	Standard Rate		Resident Discount Rate	
	Youth	**Adult**	**Youth**	**Adult**
10 Lessons	$58.50	$65.00	$45.00	$50.00
9 Lessons	$52.75	$58.50	$40.50	$45.00

Source: East Portland Community Center, 2009

FEDERAL WAY COMMUNITY CENTER – FEDERAL WAY, WASHINGTON

Table E-17. Drop-in Admission Rates

	General Admission
Toddlers (0-2 yrs)	Free
Children (3-12 yrs)	$4.00
Teens (13-17 yrs)	$5.00
Adults (18-59 yrs)	$8.00
Seniors (60+)	$5.00

Source: Federal Way Community Center, 2009

Table E-18. Membership Rates

	Standard Rate			Resident Discount Rate		
	3 Month	6 Month	Annual	3 Month	6 Month	Annual
Toddlers (0-2 yrs)	Free	Free	Free	Free	Free	Free
Children (3-12 yrs)	$78	$148	$282	$68	$129	$245
Teens (13-17 yrs)	$93	$178	$339	$81	$155	$294
Adults (18-59 yrs)	$156	$295	$565	$135	$257	$458
Seniors (60+)	$111	$214	$407	$97	$185	$353
Household	$233	$444	$846	$203	$386	$736

Source: Federal Way Community Center, 2009
Note: Household is defined as six members with up to two adults

Table E-18. Rental Rates

	Standard Rate	Resident Rate
1-12 Guests	$100	$115
13-24 Guests	$175	$202
25-30 Guest	$225	$259

Source: Federal Way Community Center, 2009
Note: Rates include one hour of activity in either the gym or pool as well as the use of a multi-purpose room for 45 minutes.

SHERWOOD YMCA – SHERWOOD, OREGON

Table E-19. Drop-in Admission Rates

	General Admission
Toddlers (0-2 yrs)	Free
Child (3-11 yrs)	$6
Adult (12+)	$12

Source: Sherwood YMCA, 2009

Table E-20. Membership Rates

	Standard Rate	Resident Discount Rate	Registration Fee
Children (under 13 yrs)	$23.00	$20.00	$25.00
Young Adult (14-24 yrs)	$34.00	$29.00	$25.00
Adult (25-64 yrs)	$53.00	$45.00	$50.00
Senior (65+)	$46.00	$39.00	$50.00
Two Seniors	$63.00	$53.00	$50.00
One Parent and Two Children	$61.00	$52.00	$75.00
Family	$80.00	$67.00	$75.00

Source: Sherwood YMCA, 2009
Note: The listed registration fee is applied to all new memberships. Family is defined as any number of individuals living in the same household and listed on the same tax return.