

Wellesley Aquatic Facility

FINAL REPORT

Prepared by:
**ConsultEcon, Inc. and
Isaac Sports Group**

Prepared for:
**Aquatics Subcommittee
900 Worcester Committee
Town of Wellesley**

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EXECUTIVE SUMMARY

ConsultEcon, Inc. and Isaac Sports Group (ISG) have completed a Needs, Program, Design, and Financial Analysis of a proposed aquatic facility at 900 Worcester Street in the Town of Wellesley. Based on a survey of Wellesley residents and market research involving user group, stakeholder, and public meetings the need for a new multi-purpose aquatic facility was established. The need spans all ages, aquatic interests, and activities. Key needs and primary uses of the proposed aquatic facility include the following:

- Lap swimming: Over 60% of all survey respondents expressed the interest and need for lap swimming lanes at all times of the day
- Family Recreation: Aquatic activities for all ages
- Competitive Aquatics:
 - Wellesley High School trains in limited space available at Babson College from 8:30 pm to 10:00 pm, and cannot accommodate all students who wish to compete
 - The Wellesley Swimming Association must turn children away due to lack of pool time and space
 - USA Swimming Teams serving Wellesley residents have waitlists and cannot accommodate Wellesley youth who look for competitive opportunities
- Aquatic Fitness and therapy/rehab program access is limited, and the interest is strongly expressed both in the survey response and in meetings and interviews
- Location: A large percentage of Wellesley residents travel outside of Wellesley to find aquatic facilities and programs that meet their basic needs.
- Programs: Area facilities are not offering the wide range of aquatic programming and recreation that residents and user groups are looking for.

Based on the aquatic program and activity needs and goals identified, three multi-pool aquatic facility options were identified. It was quickly apparent that a basic 25 yard x 8 lane pool with a small teaching pool would not meet the majority of resident needs. Eliminating this option, two viable design options were developed. It was determined that meeting the needs of the residents required a main pool with at least 15 x 25 yard lap lanes and a warm-water combination teaching pool with a zero entry section with leisure and recreation features. The need was also established for a therapy/rehab pool and a spa/hot tub pool.

Option #1 is a “stretch” 25 yard main pool measuring 121’ x 75’ (25 yards) with a moveable bulkhead, 15 x 25 yard lanes, 1 and 3 meter diving boards, and depths ranging from 4 feet to 13 ½ feet. This facility would meet the current and future needs of Wellesley residents, the high school and community teams, as well as local USA Swimming team 25 yard training needs while still creating space for round the clock lap lanes and a full range of aquatic

programming. This facility could host mid-size 25 yard swim meets for high school, recreation, USA Swimming, and US Masters Swimming. A 4,000 square foot teaching/leisure pool at 85-87 degrees meets the needs for learn to swim, aquatic fitness, senior programming, and family recreation. This option also includes a small purpose built aquatic therapy/rehab pool and a spa/hot tub.

Option #2 expands the main pool to 168' (51.2 meters) by 75' (25 yards) providing 10 x 50 meter lanes and 22 x 25 yard lanes. This added space meets all the needs of both 25 yard and 50 meter training and competition but provides added space for a broader range of recreation features and programming, more lap lanes available to users, and the ability to absorb additional growth in all the aquatic programs. This facility would be a regional asset that could host large swim meets without disrupting regular resident programming and public access. This option has the same teaching/leisure, therapy, and hot tub pools as Option #1.

While Option #2 costs more to operate, the revenue generating potential of this pool from team and event rentals and increased program use creates a larger potential operating profit. While the smaller initial option considered operated at a deficit, both Option #1 and Option #2 operate at a net surplus. The financial profit and loss in Year Two of operation for both options is as follows:

	<u>Option #1</u>	<u>Option #2</u>
Expenses	\$1,243,939	\$1,359,354
Revenue	<u>\$1,823,154</u>	<u>\$2,173,827</u>
Operating Net Profit	\$ 579,215	\$ 814,472

Initial rough project cost estimates were developed, including all hard construction costs, soft costs, design fees, and contingencies. These preliminary estimates are done on a square footage construction cost estimate basis, based on a standalone aquatic center. Significant construction and operation savings may be achieved through shared spaces and amenities between the ice rink facility and the aquatic facility. Following is a summary of the preliminary cost estimates

Option #1

Gross Square Footage	44,869 square feet
Cost/Square Foot Range	\$320 to \$330
Project Cost Estimate Range	\$14.4 to \$14.8 million
Reduced project cost estimate with common space sharing:	\$13.3 to \$13.6 million

Option #2

Gross Square Footage	54,116 square feet
Cost/Square Foot Range	\$320 to \$330
Project Cost Estimate Range	\$17.3 to \$17.9 million
Reduced project cost estimate with common space sharing:	\$16.0 to \$16.5 million

The final decision on the best design and programming option will depend on the ability to fit the optimum ice rink/aquatic facility on the 900 Worcester site, the capital cost structure, and return on investment for the developer. The success of the aquatic facility will also depend on professional business oriented facility and aquatic program management and marketing.

Option #1 will meet current and future needs of Wellesley residents. Option #2 will meet these needs and create new and enhanced programming and opportunities for residents and the broader community while creating more revenue potential for the aquatic facility. Option #1 would be an asset for the Town of Wellesley. Option #2 has the potential to become a regional asset that will meet Wellesley's needs for many decades to come.

Section I INTRODUCTION AND ASSUMPTIONS

ConsultEcon, Inc. and Isaac Sports Group were retained by the Town of Wellesley, Massachusetts to provide a needs assessment study of a proposed new aquatic facility to be located at 900 Worcester Street in Wellesley, a site currently owned by the Town. The study's objective is to determine the design, components and configuration of a new aquatics facility that meets the important and unmet needs and desires of all Town of Wellesley residents. This report includes summary and analyses of the following areas of inquiry:

- ◆ **Community Engagement and Discovery** encompasses the results of an online survey of Town residents, two public meetings and regular phone calls with members of the Aquatics Subcommittee of the 900 Worcester Committee of the Town of Wellesley, outreach to aquatic user groups, and analysis of existing aquatic facilities in the area.
- ◆ **Program and Facility Schedule** designed to meet the needs and wishes of the residents and stakeholders and integrating new programming trends, opportunities, and national best practices to further enhance the overall aquatic program and provide the basis for growth long into the future.
- ◆ **Facility Features and Amenities** identified by residents and user groups in the community engagement and discovery phase to develop the features, configurations, spaces, and amenities needed in the facility to support the immediate needs and the anticipated needs well into the future.
- ◆ **Financial Structure** focused on three areas including fee structures, project cost estimates, and operating budget projections.

ASSUMPTIONS

In preparing this report, the following assumptions were made. This study is qualified in its entirety by these assumptions.

1. Every reasonable effort has been made in order that the data contained in this study reflect the most accurate and timely information possible and it is believed to be reliable. This study is based on estimates, assumptions and other information developed by ConsultEcon, Inc. and Isaac Sports Group from its independent research efforts, general knowledge of the industry, and consultations with the

client. No responsibility is assumed for inaccuracies in reporting by the client, its agents and representatives, or any other data source used in the preparation of this study. No warranty or representation is made that any of the projected values or results contained in this study will actually be achieved. There will usually be differences between forecasted or projected results and actual results because events and circumstances often do not occur as expected. Other factors not considered in the study may influence actual results.

2. Any resulting design of the Wellesley Aquatic Facility will serve to create a high quality, recreational attraction with broad-based market appeal. The Wellesley Aquatic Facility will be a unique recreational attraction in the Town and the area. The entrances to the site will be highly visible and well signed. Any additional land on the site will be used in a manner advantageous to the success of the project.
3. Any resultant Wellesley Aquatic Facility will be competently and effectively managed. An aggressive promotional campaign will be developed and implemented. This program will be targeted to prime market segments. Any fees charged by the facility will be consistent with the recreational value offered, and with current prices and fees for other comparable facilities.
4. There will be no physical constraints to impede visitors to the Wellesley Aquatic Facility, such as major construction activity. Changes in economic conditions such as a major recession or major environmental problems that would negatively affect operations and visitation will not occur in the near future.
5. Possession of this report does not carry with it the right of publication. This report will be presented to third parties in its entirety and no abstracting of the report will be made without first obtaining permission of ConsultEcon, Inc., which consent will not be unreasonably withheld.
6. This report may not be used for any purpose other than that for which it was prepared. Neither all nor any part of the contents of this study shall be disseminated to the public through advertising media, news media or any other public means of communication without the prior consent of ConsultEcon, Inc.
7. This report was prepared between April and June 2015. It represents data available at that time.

Section II
METHODOLOGY

This section reviews the methodology undertaken during the course of the project. ConsultEcon, Inc. and Isaac Sports Group (ISG) used a wide variety of resources and methods to analyze resident and community current use, needs, and priorities in aquatic facilities and programming. The findings of this research and the survey results were then utilized to develop the analysis and recommendations on optimum aquatic facilities and needs for the Town of Wellesley.

The ConsultEcon project team included the following:

Robert E. Brais	Lead Consultant
James Stevens	Survey and Project Manager
Monika Bernotas	Survey Analyst
Allison Kehn	Report Production and Project Administrator

The ISG project team included the following:

Stu Isaac	Lead Consultant
Duane Proell	Technical, Management, and Programming Input

The study process began with several conference calls and interviews with the 900 Worcester Aquatic Subcommittee and key stakeholders and user groups, followed by an initial discovery visit and meetings by Stu Isaac May 26-28. This visit included a public meeting at Wellesley Town Hall on May 28 which included both Stu Isaac and Robert Brais from ConsultEcon. Stu Isaac returned for a follow up site visit and meetings June 10-11 which included another public meeting and included Robert Brais from ConsultEcon.

A survey of Wellesley residents was conducted to gauge their current usage of aquatic facilities and their interest in a new facility in Wellesley. The questionnaire was developed in conjunction with the Aquatics Subcommittee of the 900 Worcester Street Committee of the Town of Wellesley. The questionnaire was distributed using surveymonkey.com, an online survey provider. The survey was designed to target the residents of the Town of

Wellesley. Survey responses were collected between May 22 and June 5, 2015. The Town of Wellesley notified potential respondents to take the survey via 10 different distribution channels including, in no particular order:

1. Respondents that provided their email addresses in response to a 2012 aquatic facility survey conducted by the Town of Wellesley
2. Email addresses of Town of Wellesley Meeting Members
3. Town of Wellesley recreation department email list
4. Wellesley Swimming Association email list
5. Town of Wellesley Council on Aging email list
6. Wellesley Mother's Forum email list
7. Town of Wellesley website main page
8. Town of Wellesley Parent Teacher Organization email list
9. Town of Wellesley 900 Worcester Street Committee's email list
10. Paper surveys in Town Hall and the Public Library

Meetings and interviews during the study period included a mix of stakeholders, potential user groups, aquatic program leaders, and interested parties. Specifically, these meetings and interviews included but were not limited to the following:

- 900 Worcester Aquatic Subcommittee
- David Perry, Chairman of the 900 Worcester Ice Rink Subcommittee
- Wellesley Public Schools
 - Dr. David Lussier, Superintendent
 - John Brown, Athletic Director
 - Jen Dutton, High School Swimming Coach
- Wellesley Recreation Department
 - Jan Kaseta, Director
 - Brandon Fitts, Associate Director
- West Suburban YMCA, Newton, MA
 - Jack Fucci, President and CEO
- Little Flippers Swim School:
 - Sally Poveromo, President and Founder
 - Ed Poveromo

- Area Teams and Programs
 - Wellesley Swimming Association
 - Chris Anzelloti, Coach
 - Eric Fichtel, Past President (Aquatic Sub-committee member)
 - Charles River Aquatics, Stephanie Morawski
 - Shawmut Aquatic Club
 - Attleboro Bluefish
 - Bernal Gators
 - Diving: Zack Lichter, Wellesley College and Boston Area Diving
 - Wellesley S.T.A.R.S.
- Potential developers for Ice Rink and overall project
 - Corbelis: Garrett Solomon
 - DeVellis Consulting/Edge Sports: Brian DeVellis
 - Frost Realty Associates: Paul Gilmartin

Another important part of the research was site visits of area and regional aquatic facilities and pools to better understand the aquatic need in Wellesley, how it is met throughout the region, and identify new and enhanced opportunities for an aquatic facility in Wellesley.

Facilities and programs visited and researched included:

- Wayland Community Pool: Wayland, MA
- Beede Swim and Fitness Center: Concord, MA
- Cornerstone Aquatic Center: West Hartford, CT
- West Suburban YMCA: Newton, MA
- Longfellow Sports Club: Natick, MA
- Boston Sports Club: Wellesley
- Little Flippers Swim School: Natick, MA
- Goldfish Swim School: Needham, MA
- Morses Pond: Wellesley

Past research in the area over the last two years also included aquatic facility visits and program and usage research in the major facilities in the area, including:

- Harvard
- Boston University
- MIT

We also drew on research with the local, regional, and national sports governing bodies that could impact team and event usage of a new Wellesley Aquatic Facility, including New England Swimming, and governing bodies in swimming, diving, and water polo. Top aquatic facilities around the country and region were also researched to determine best practice program, management, and design elements that could be applied in Wellesley to most effectively meet town and resident needs.

The needs, goals, and objectives of town residents and the broader aquatic and regional communities were determined and prioritized through these meetings, interviews, and site visits in combination with the survey results. These results provide the basis for the programming model developed for a potential Wellesley Aquatic Facility. Once the programming and event model was established, the design concepts and options were reviewed with respect to the programming opportunities and model. During this process ISG met with interested ice rink developers and potential aquatic partners to better understand their questions and concerns about the aquatic side of the project and to ensure that this study provides them with important aquatic and market information needed to prepare a financially viable proposal that meets the aquatic needs of the Town of Wellesley and its residents.

Projected operating expenses and revenue were then developed based on local costs, regional facility budgets, and best management practices. Membership and user fees and facility rental rates were determined through analysis of regional market, local demand, and best practices. These were used to develop a five year annual operational proforma for the proposed aquatic facility. These financial operating expenses were then validated against comparable facilities in comparable climates as well as confirmed by discussions with experienced aquatic facility managers and engineers. Staff and management needs and costs are based on experience in managing pools and best practices at comparable facilities.

Section III

AQUATIC FACILITY SURVEY SUMMARY

This section summarizes the results of a survey of Town of Wellesley residents. The survey questionnaire is appended to this report in **Attachment #11** and detailed survey results are in **Attachment #12**.

Survey Response

A total of 1,175 responses were received. Due to nature of survey distribution, as described in the methodology section, the response rate is unknown.

Respondent Demographics

Of the 1,175 survey respondents, 1,143 (98%) were residents of Wellesley, while 24 (2%) were not. Eight respondents did not identify their residency. Based on an estimated 2015 households of 8,927 in the Town of Wellesley, the responses represented about 12.6 percent of all Wellesley households. Among respondent households, there was an average household size of 3.74, compared to the average household size of 2.75 estimated by ESRI. 60 percent of respondent households were 4- or 5-person family households. Overall, 21 percent of respondent households were one or two person households, with the remaining 79 percent representing three or more person households.

The age profile of survey respondents skewed toward family households, with population groups 20 to 34 years old and 55 years and older underrepresented, and population groups under 20 years old and between 35 and 55 overrepresented, compared to 2015 population data for Wellesley resident population. Forty-two percent of persons in respondent households are under the age of 20, compared to 33 percent of Wellesley's population. Eighteen percent of persons in respondent households are over 55, compared to 28 percent of the town population estimates.

Current Aquatic Facility Usage and Pricing

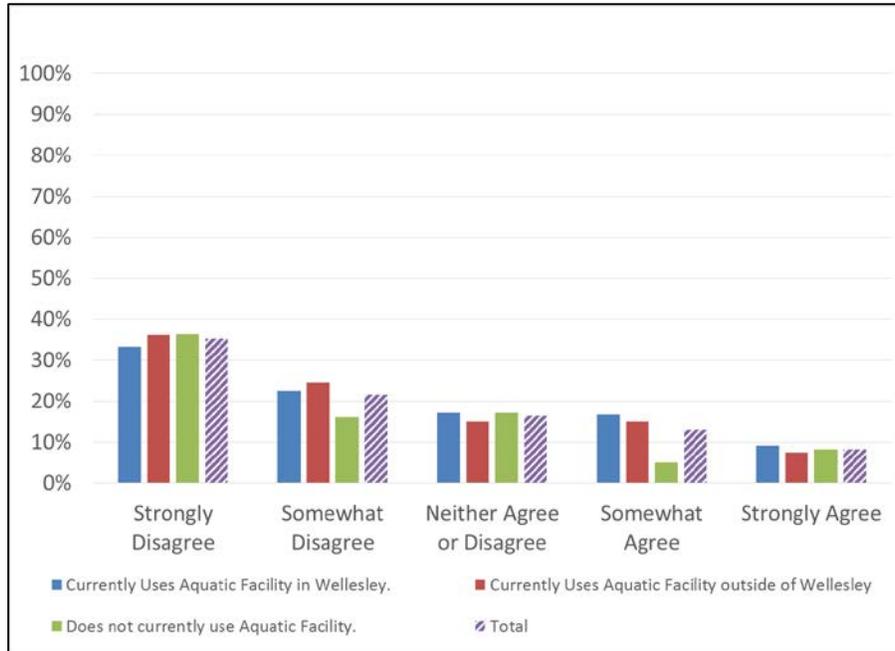
Of all respondents, 73 percent are currently aquatic facility users, while the remaining 27 percent are non-users. About half of facility users use facilities within the Town of Wellesley, while the other half go outside of Town. Households with 3 or more persons are slightly more likely to use an aquatic facility outside of Wellesley than 1- or 2-person households. The most popular aquatic facilities used among facility users included Morses Pond (34 %), Boston Sports Club – Wellesley (28%), Longfellow Sports Club – Natick (21%), Wellesley College (11%), Dana Hall School (10%), and Babson College (9%).

Pricing for use of the existing user facilities is variable. Pricing for households with 3 or more persons was on average more than double the price for 1- or 2-person households. For all respondents, for a single day use, the average price was \$15 and the median was \$10.

Households with 3 or more persons paid on average \$21 per day use and 1- or 2-person households paid on average \$9 per day use. For all respondents, monthly use cost on average \$134 per month, and the median was \$89 per month. Households with 3 or more persons paid on average \$264 per month and 1- or 2-person households paid on average \$51 per month. For all respondents, annual passes were \$1,766 on average and a median of \$800. Households with 3 or more persons paid on average \$1,872 per year and 1- or 2-person households paid on average \$367 per year.

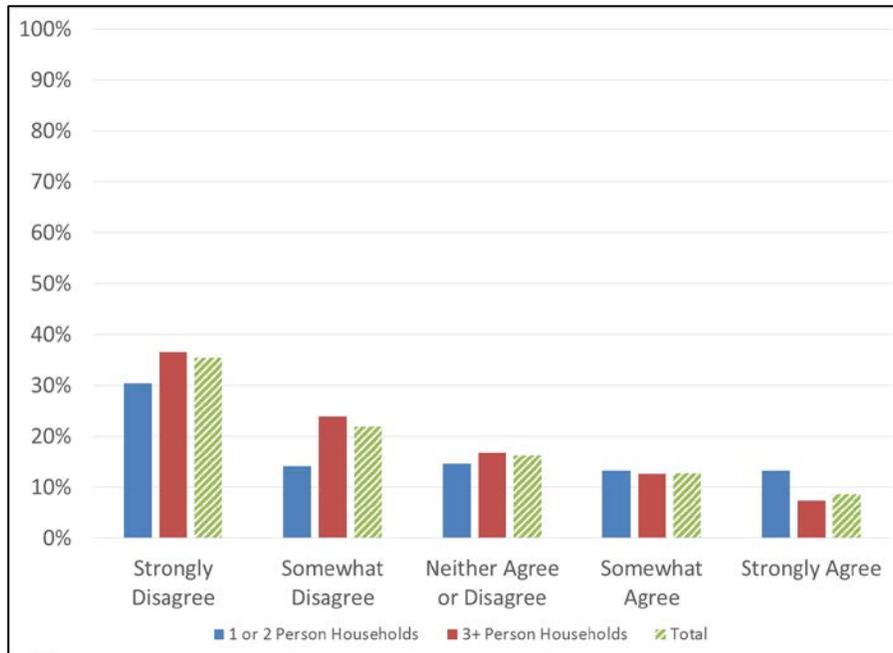
Several questions were posed as statements to which respondents expressed the degree to which they agree or disagree. The most telling of these statements was, “My aquatic needs are met by existing local facilities.” Overall, 57 percent of respondents disagreed with the statement. Data in **Figure III-1** summarize the response to this statement by all respondents (total in chart) and as broken out by current aquatic facility users and non-users. Both users and non-users strongly disagree with this statement, indicating that an additional facility may be welcome in this market. By comparison, data in **Figure III-2** summarize the response to the statement by all respondents and as broken out by household size. Households with 3 or more persons are slightly more likely to disagree with the statement, indicating that family households are likely to be more supportive of a new aquatic facility.

Figure III-1
Response to Statement “My Aquatic Needs are met by existing local facilities.”
Total and Cross-Tabulation by User Status



Source: ConsultEcon, Inc.

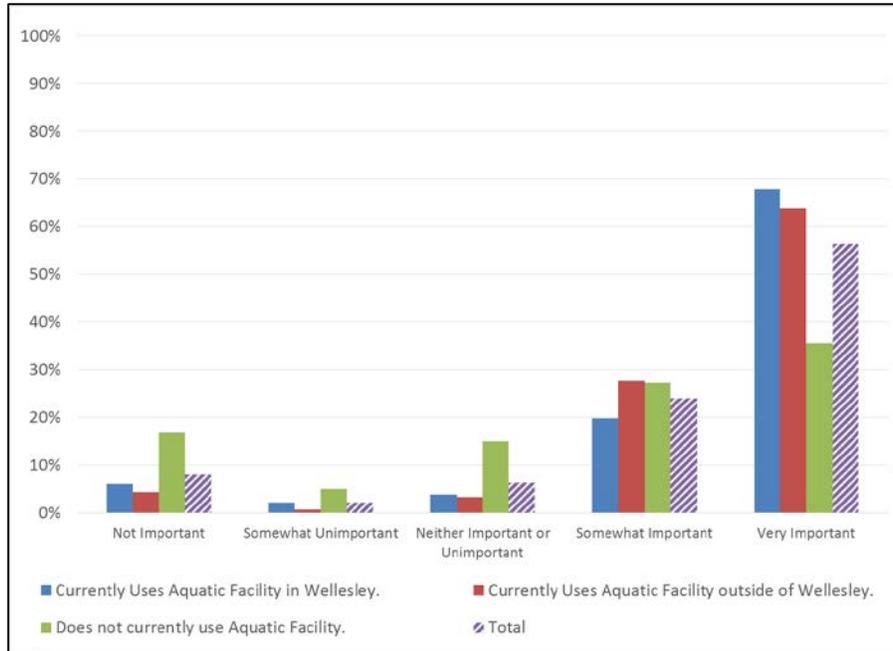
Figure III-2
Response to Statement “My Aquatic Needs are met by existing local facilities.”
Total and Cross-Tabulation by Household Size



Source: ConsultEcon, Inc.

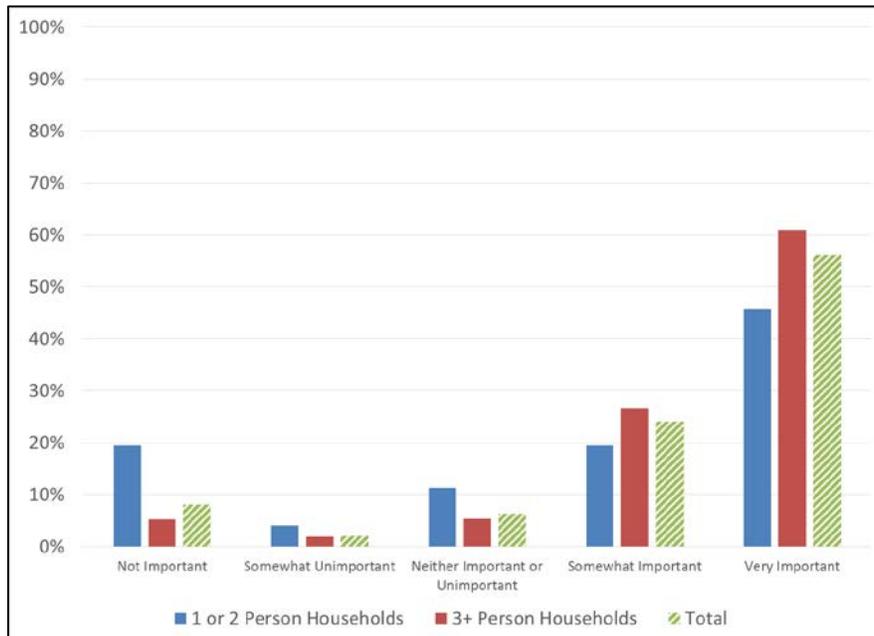
In response to the question “How important (on a scale of 1 to 5) is developing a new aquatic facility in Wellesley?” about 83 percent of respondents reported that it was either somewhat or very important, with 57 percent reporting it was very important. Data in **Figure III-3** show the comparison of these responses by current aquatic facility users and non-user. The data show that the new aquatic facility is of most importance to users who currently use aquatic facilities while non-users place less importance on the new facility. Data in **Figure III-4** show the comparison of responses by household size. These data show that larger households place more importance on the new aquatic facility.

Figure III-3
 “How important is developing a new aquatic facility in Wellesley?”
 Total and Cross-Tabulation by User Status



Source: ConsultEcon, Inc.

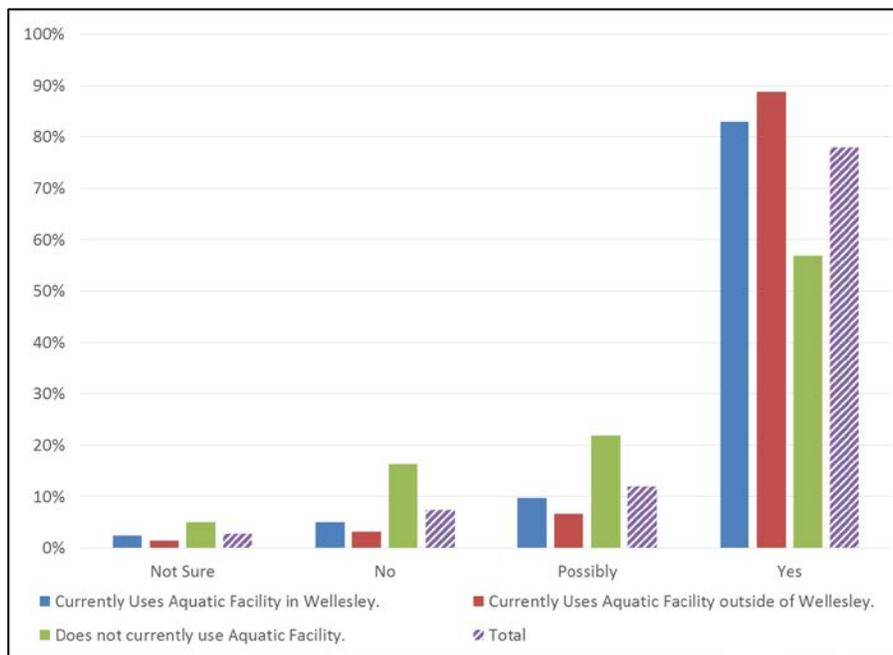
Figure III-4
 “How important is developing a new aquatic facility in Wellesley?”
 Total and Cross-Tabulation by Household Size



Source: ConsultEcon, Inc.

In general, respondents were receptive to the potential to use a new aquatic facility. About 78 percent of respondents reported that they would be likely to use the new aquatic facility. This proportion was particularly high among aquatic facility users who travel out of town to use aquatic facilities; 89 percent of those respondents reported an interest in using a new facility in Wellesley. Over 50 percent of non-users reported that they would consider using a new aquatic facility, indicating that the new facility would satisfy demand from Town residents that is not currently being met by existing facilities. Data in **Figure III-5** show the comparison of responses for current aquatic facility users and non-user.

Figure III-5
“Would you or a member of your household consider using a new Aquatic Facility in Wellesley?”
Total and Cross-Tabulation by User Status



Source: ConsultEcon, Inc.

The top activities that are the primary reasons for using a new aquatic facility include swimming laps (61%), family recreation (60%), personal recreation (55%), and swimming lessons (41%). However, there is a divergence in reasons between 3 or more person households and 1 or 2 person households. Data in **Table III-1** show the top aquatic activities segmented by household size. While both groups share swimming laps and personal

recreation as top activities, 1- and 2-person households are most interested water walking / aerobics and therapy / rehabilitation, while households of 3 or more people are more interested in family recreation, swimming lessons, and recreational swim teams. Additional feedback was provided in a comments section, which has been summarized as a word cloud in **Figure III-6.**

Table III-1
“What are the primary reasons you or members of your household would use a new Aquatic Facility in Wellesley?”
Total and Cross-Tabulation by Household Size

Aquatic Activities	All Responses	Aquatic Activities	1 or 2 Person Households	Aquatic Activities	3+ Person Households
Swimming Laps	61%	Swimming Laps	60%	Family Recreation	73%
Family Recreation	60%	Personal Recreation	46%	Swimming Laps	63%
Personal Recreation	55%	Water Walking / Aerobics	39%	Personal Recreation	60%
Lessons	42%	Therapy/Rehabilitation	26%	Lessons	52%
Summer / Recreation Teams	32%	Family Recreation	23%	Summer / Recreation Teams	40%
Summer/Vacation Camps	27%	Adult (Masters) Training	13%	Summer/Vacation Camps	35%
School Teams	23%	Lessons	11%	School Teams	29%
Lifeguard & Safety Training	21%	Would not use the facility	8%	Lifeguard & Safety Training	20%
Water Walking / Aerobics	21%	Summer / Recreation Teams	7%	Adult (Masters) Training	18%
Adult (Masters) Training	16%	Non-Aquatic Exercise	6%	Water Walking / Aerobics	17%
Therapy/Rehabilitation	14%	Triathlon Training	6%	USA Swimming Club Team	16%
USA Swimming Club Team	13%	SCUBA Diving Instruction	5%	Diving, instruction and team	13%
Diving, instruction and team	10%	School Teams	4%	Triathlon Training	11%
Triathlon Training	10%	Lifeguard & Safety Training	4%	Therapy/Rehabilitation	11%
SCUBA Diving Instruction	9%	Summer/Vacation Camps	3%	SCUBA Diving Instruction	11%
Non-Aquatic Exercise	6%	USA Swimming Club Team	1%	Non-Aquatic Exercise	6%
Would not use the facility	4%	Diving, instruction and team	1%	Would not use the facility	3%
Other (please specify)	3%	Other (please specify)	NC	Other (please specify)	NC

NC = Not Calculated

Source: ConsultEcon, Inc.

Table III-2
“Which of the following features are most important to you in a new Aquatic Facility in Wellesley?”
Total and Cross-Tabbed by Household Size

Aquatic Facility Features	All Responses
Lap Swim / Competitive Area	62%
Deep and Shallow Water	59%
Swim Lessons	53%
Separate Family Lockers	32%
Diving Board(s)	30%
Play Area for Children	30%
Waterslides	26%
Concessions	22%
Walking / Running Track	22%
Cardio Area	21%
Multiple Water Temperatures	20%
Gym / Court Space	19%
Easy Entry Pool Ram	19%
Sauna	18%
Tot Slide / Spray Features	18%
Competition Features / Seating	16%
Steam Room	16%
Party Room	11%
Other (please specify)	8%
Onsite Childcare	7%
Meeting Space	6%
None	6%

Source: ConsultEcon, Inc.

Section IV

OVERALL PROGRAMMING AND SCHEDULING

PROGRAM OVERVIEW

The aquatic needs survey confirmed, amplified, and quantified the many findings of the market research. There is significant unmet demand across the full range of aquatic programming, competitive, and recreational activities. This unmet demand spans all ages and interests. Residents who are able to participate in aquatic activities are using facilities across a broad geographic radius outside of Wellesley and often paying high private club prices. Even the programs offered are significantly limited by lack of suitable depths and temperatures, the lack of pool space and time, and very inconvenient schedule time frames; resulting in wait lists, lack of opportunities, and even discouraging participation in aquatic programs. In most cases these pool feature, space, and time limitations allow for only the most basic aquatic programming. New and innovative aquatic fitness, recreation, leisure, and training opportunities and design features are not part of area aquatic facilities and programming. These opportunities for an innovative aquatic program in Wellesley and the great region provide a foundation for a successful new aquatic facility.

Aquatic program and activity needs in the area are as follows:

- Aquatic Fitness
 - Lap Swimming
 - Open lap lanes at all times of the day
 - Organized masters and adult training programs with coaches and technique
 - Aquatic Fitness and cross training for all ages and intensity levels
 - Programs offered throughout the day to accommodate wider range of user schedules
 - Depth and temperatures suitable to variety of programs
 - Water walking and running
 - Personal training
 - Deep and shallow water aquatic fitness
 - New trends in aquatic fitness
 - Senior specific programming

- Special needs programming
- Recreation
 - Recreation for all ages
 - Family oriented programming
 - Organized and open recreation and leisure time and access
 - Summer and vacation camps and activities
 - Specific recreation classes
 - Scuba
 - Diving
 - Kayak/Canoe
 - Stand up paddling
- Competition and Training
 - Training pool space at appropriate times of the day
 - Wellesley High School
 - Wellesley Swimming Association
 - USA Swimming, diving, and water polo programs
 - Masters Swimming and Triathlon training groups
 - Special needs training and competitive programs
 - Swim meets and events
 - Pre-team and bridge programs providing integrated progression from swim lessons through pre-team leading to competitive swim teams
 - Overall expansion of opportunities to participate in wide range of competitive programs
- Education and Water Safety
 - Swim lesson programs for all ages, levels, and abilities, including adults and special needs
 - Scholarship programs for those who cannot afford lessons or water safety programs
 - Lifeguard and water safety training and certification
- Health and Wellness
 - Therapy and Rehab
 - Non-aquatic fitness programs and facilities

Three critical considerations that apply to all programming emerged during this research:

Concurrent Programming - Any aquatic facility needs to have pool configurations and space to allow for concurrent programming. One program cannot take all of a facility eliminating any other programming. While a swim team is training there still must be open lap lanes for member use. During swim lessons there still needs to be space for aquatic fitness and therapy. When a swim meet is held in the facility, members still need access to the lap swim, aquatic fitness, and recreation. Concurrent programming is not only critical to attracting members and users; it is a critical element of the successful financial operation of the aquatic facility.

Integrated Programming - Programming must be integrated to insure that users at all ages get the most out of their aquatic experience, leading them through a logical progression of skills and fitness levels. This applies to an integrated track from the youngest parent and tot lesson through pre-team to swim team to masters swimming and a life-long swimming fitness regimen. It also means a logical progression from therapy/rehab to regular aquatic fitness. It means developing special needs program that can lead to mainstream aquatic recreation or training programs. The current aquatic program market offers a wide range of individual programs that are not linked in any logical progression, limiting opportunity and development at all age, skill, and fitness levels.

User Appropriate Scheduling - Many aquatic programs in the area are only offered at one or two times of the day, significantly reducing the opportunity to participate for many interested users. This applies to many types of programming. For example:

- Aquatic fitness programs only offered mid-morning on weekdays that:
 - Limits participation by those working regular hours
 - Reinforces the stereotype of aquatic fitness participants
- High School swim team training from 8:30 pm to 10:00pm, negatively impacting high school students
- Masters swimming only practicing during early morning hours without training time during key after work hours
- Learn to swim lessons in the summer in the morning, not providing for late afternoon hours to accommodate today's over scheduled youth

- Lack of lap swimming lanes available during 5:00 pm to 7:00 pm time slots when teams are using all of the lanes

All three of these major concerns have their root causes in lack of pool time and space. A well-designed and planned facility can address each of these three concerns. It is necessary to address these concerns to achieve the goals of the Town of Wellesley and for an aquatic facility to be financially viable.

It is also critical to balance open recreational pool time with scheduled programming time. The survey clearly indicates the importance of family and recreational use. Recreational programming includes both free and open time use of aquatic recreational features as well as scheduled recreational programs. The scheduling model for both Option #1 and Option #2 provide significant open recreational times in the main pool each Saturday and Sunday afternoon year round. Open recreation time is available during summer weekdays from 4pm on each day, with additional afternoon time available depending on camp program needs.

The Teaching/Fitness pool has open recreation time in the afternoons and evening every day both during the school year and the summer.

AQUATIC FACILITY SCHEDULING MODEL

To successfully maximize all of the aquatic programming opportunities it is important to develop a scheduling model for the pools in the aquatic facility. The survey results not only reflected the expected high density demand for pool use and activities after school through early evening but a significant user demand during the traditionally slow period from 9:00 am to 3:00 pm. This finding is encouraging for the overall programming and financial viability of the aquatic facility. Even at this early stage of the development process, a detailed program model is critical to understanding the space and time needed for every program to support the community and stakeholder programming needs, determine the design elements of a new facility, and sustain the business plan. It is also important for potential developers and each stakeholder and potential user group to understand how their needs would be met and how all programs would share spaces and work together. The schedule model shows a balance

between scheduled programming and open recreation and family access. The survey indicates that this balance is important to respondents, especially the family users. The schedule matrix is also an important management and programming tool for any potential facility developer.

Based on the different pool configurations two parallel options are evaluated as a part of this report. Schedule models are developed for both aquatic facility Option #1 and Option #2 (see design section, Section XI of this report for a description of each option). The Aquatic Facility Option #1 Schedule Model is included in this report as **Attachment #1** and Option #2 Schedule Model as **Attachment #2**.

The Schedule Model for each option has the following elements:

- Teaching/Fitness/Leisure Pool-School Year
- Teaching/Fitness Pool-Summer
- Main Competition/Training Pool
 - School year-weekdays
 - School year-Saturday
 - School year-Sunday
 - Summer-weekdays
 - Summer-weekend

The Schedule Model is color coded by all the categories of programming. These categories include:

- Community/Recreation Programming and open pool access time
- General Lap Swim lanes
- Aquatic Fitness Programming
- Swim Lessons
- Summer Rec Team
- Disabled/Special Needs Programming
- Wellesley High School Teams
- USA Swimming Club teams
- Masters Swim Program
- Pre-Team Program
- Diving (outside club user)
- Water Polo (outside club user)
- Rental Space availability
- Camp Programming

- Senior Programming
- Family Swim

The keys of successful scheduling and integration of programming in the proposed aquatic facility are as follows:

- Concurrent multi-programming built into the schedule
- Space and time for regular programming and member access during use of sections of pool for team training or events
- High School Swimming
 - Better after school training hours
 - Facility to host high school meets without disrupting regular community programming
- Masters Swimming
 - Early morning hours before work
 - Lunch time hours
 - Evening after-work hours
- Lap Swimming – access to public lap swimming lanes at all times of day in at least one pool and preferably in both main and teaching/fitness pool
 - Options of cool and warm-water lanes
- Swim Lessons at key times
 - After school
 - Mornings for pre-school
 - Adult times throughout the week
 - Ample access times for private and semi-private lessons

An example of the scheduling detail from Option #1 Schedule Model is shown by data in **Figure IV-1**. This is the daily weekday schedule for the aquatic facility during school year weekdays.

Figure IV-1
Example of Scheduling Detail

Wellesley Aquatic Facility
 121' (25 yard) x 75' Main Pool with Bulkhead
 Option #1
 School Year
 Weekdays

NOTE: Pool 1 & 2 are main pool divided by Bulkhead

	POOL 1					POOL 2									
	4.0'-5.5' deep					5.5' to 13.5' deep									
	1	2	3	4	5	1	2	3	4	5	6	7	8	9	10
5:00 AM	LapSwim					Club Team Training					Masters Group				
6:00 AM	LapSwim					Club Team Training					Masters Group				
7:00 AM	LapSwim					Club Team Training					Masters Group				
8:00 AM	Open Rec		Community Program			LapSwim					Deep Water Fitness				
9:00 AM	LapSwim					LapSwim					Open Programming Can fill as demand dictates				
10:00 AM	LapSwim					LapSwim					Open Programming Can fill as demand dictates				
11:00 AM	LapSwim					LapSwim					Masters				
12:00 PM	Fitness Program		Senior Program			LapSwim					Masters				
1:00 PM	LapSwim					LapSwim					Open Programming Can fill as demand dictates				
2:00 PM	LapSwim					LapSwim					Open Programming Can fill as demand dictates				
3:00 PM	LapSwim					LapSwim					Open Programming Can fill as demand dictates				
4:00 PM	LapSwim					Wellesley High School Swim					WHS Diving				
5:00 PM	LapSwim					Special Needs					Outside Club Swim Team Rental				
6:00 PM	Masters					LapSwim					Deep Water Fitness				
7:00 PM	LapSwim					LapSwim					Deep Water Fitness				
8:00 PM	LapSwim					Open Space for outside rental Water Polo					Club Diving				
9:00 PM	LapSwim					Recreation classes/Scuba or other program in demand					Club Diving				
10:00 PM	LapSwim					LapSwim					LapSwim				

Config. Pool 2 lanes are lengthwise
 Pool 1 lanes are cross pool

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Special Needs
Outside Team Rental
Masters/Triathlon
Wellesley High School Team
Pre-Team Program
Diving
Open Family Recreation
Outside Water Polo Club Team
Rental/Income
Fitness Programming
Therapy and Rehab
General Lap Lanes
Swim Lessons
Wellesley Summer Rec Team
Community Programming
Camp Programming
Senior Programming

Section V

LEARN TO SWIM PROGRAMS

MARKET OVERVIEW

Learn to Swim programs are the single biggest program revenue source for most public and private aquatic facilities. They are also the most direct way to connect the facility to the community through aquatic programming. The survey results clearly indicate the importance of learn to swim/swim lessons in the Wellesley area as follows.

- Fifty-six percent of all respondents indicated they or a member of their family have taken swim lessons in the five years.
- Fifty percent of the 3+ person households responding rated swim lessons as one of the primary reasons they would use a new aquatic facility in Wellesley.
- Of all respondents, swim lessons were the highest ranking paid programming element in the study.
- Eleven percent of the 1 or 2 person households indicated lessons as a primary reason for using the aquatic facility, which indicates interest in lessons beyond just the family market.

The survey also shows us that the Wellesley population will pay market rates for lessons. The two facilities/programs showing the largest lesson volume among respondents were the Longfellow Sports Club in Natick and the Boston Sports Club in Wellesley, both private fitness/health clubs with lesson rates at the higher end of the market range.

The wide geographic range of facilities and swim lesson programs that Wellesley residents have utilized clearly indicate that a good lesson program with lesson friendly features in Wellesley will attract many of these users. Current lesson programs in Wellesley include summer lessons at Morses Pond offered through the Wellesley Recreation Department and programs at Wellesley College, Dana Hall, and Babson College. These programs are offered year round, but these facilities do not have warm teaching friendly pools or wide ranges of class and time offerings. Many of these lesson programs in Wellesley have wait lists or a “feeding frenzy” at the opening of registrations, indicating unmet demand. The lack of

community pools in neighboring towns also will create a broad geographic base to lessons at the proposed Wellesley aquatic facility.

The Little Flippers Swim School opened in 2012 in Natick. This commercial swim school has a purpose built teaching facility and has developed a strong youth swim lesson program. In late May Goldfish Swim School opened in Needham, its third Boston area location. These two commercial swim schools will be a factor in the area market, but their lesson rates are the highest in the market.

A market and fee structure analysis of local, regional, and national swim lesson program is attached to this report as **Attachment #3**. This analysis breaks down the program and fee structures at a wide range of area aquatic facilities, including public, YMCA, fitness clubs, and commercial swim schools. Since swim lesson class sessions vary in time and number of classes, the analysis breaks down lesson fees to the cost of 30 minutes of lesson time. The data include group lesson student to teacher ratios where available as well as private and semi-private lesson rates. The analysis also indicates resident/non-resident rates or member/non-member rates for public and private facilities respectively. The highest rate per 30 minutes of group lesson time is Boston Sports Club in Wellesley at a rate of \$29.80 per 30 minutes followed closely by Little Flippers Swim School at \$24.95 per 30 minutes and Goldfish Swim School at an average of \$22.00 per 30 minutes. The Longfellow Sports Club group lessons are more reasonably priced at \$16.25 per 30 minutes for members and \$25.00 per 30 minutes for non-members. Public facility rates in the area are typically lower. For example, Morses Pond in Wellesley charges \$8.00 per 30 minutes.

All facilities have non-resident or non-member premiums that range from 30percent to 50percent in additional cost.

FACILITY NEEDS

The key facility and design elements needed for a great swim lesson programs are:

- Warm Water 85-87 degrees
- Range of depth: 3 feet to 4 ½ feet
- In-water bench alongside of pool for comfortable staging of lessons
- Depth sloping side to side and not end to end of teaching pool to provide more shallow teaching stations
- Deck-level roll out gutters for ease of access
- Family changing rooms
- Comfortable viewing area and Wi-Fi internet access for parents

PROGRAM DRIVERS

Increased diversity of classes, access and class times available throughout the year (see Schedule Models in Attachment #1 and Attachment #2) are all key drivers of swim lesson programs. These include:

- After school lessons
 - Also include later afternoon swim lesson times during summer to provide opportunity for kids involved in other daily camp, school, and sport programs and are not able to take lessons during the morning sessions
- Morning and midday pre-school classes and Mom and Tot classes
- Evening adult swim classes (adult lessons are increasingly popular, especially in active affluent communities)
- Private, semi-private and special lesson programs (private and semi-private lessons is the fastest growing category of swim classes even in public pools)
- Weekend classes
- Swim lesson programs provided to grade school children through the local school (potential grant funding)
- Grant and funding programs to provide swim lesson scholarships to those that cannot afford lessons, targeting, for example, students on free and reduced lunches
- Seamless integrated transition through swim lesson levels into pre-team programs and into entry level swim and diving team programs
- Proximity of swim lesson program to main pool programs and activities to engage and incentivize learn to swim students to aspire to using the large pool and participating in the sport and recreational activities of the ‘big kids’
- Opportunity for parents and siblings to participate in their own recreation or fitness activity during lessons
- Aquatic related activities for children to participate in before and after swim lessons, creating engagement beyond just the swim lesson

SWIM LESSON PRICING AND PROJECTIONS

While lesson rate and class structures will ultimately be the decision of the developer and manager of the aquatic facility, a proposed structure was developed based on the market research. Projections of participation and gross lesson revenue were estimated to inform the financial potential of the proposed aquatic facility.

Lesson rates were targeted based on the following assumptions and goals:

- Position rates below the top end private club or commercial swim schools but higher than the community or YMCA lesson range
 - Create value proposition and credibility in program while providing more cost accessible lessons
 - Aquatic Facility teaching pool will provide better teaching environment than the community and YMCA models and even better than the private clubs
- Provide resident pricing discount for Wellesley residents
- Provide member/non-member pricing differentiation significant enough to incentivize membership in Aquatic Facility
 - Non-member premium averaging approximately 40%

The fee and class structure used in this study is as follows:

- Class Session consists of 8 x 30 minute lessons
- Student/teacher ratio is between 4:1 to 5:1
- Class Fees:
 - Wellesley Resident or Member: \$112.00 per class session
 - Average of \$14/30 minutes
 - Non-resident or non-member: \$160.00 per class session
 - Average of \$20.00/30 minutes
 - NOTE: The mechanism to get the resident/member rate would be to become a member, with Wellesley residents having a discounted membership fee. This keeps the member incentive in place for residents. See membership fee discussion in Membership Section, Section X of report.

The actual structure and fees will be established based on the business and programming model of the management of the aquatic facility. Nonetheless, the class and fee structure used in these projections provides a good estimate of the potential, and are somewhat conservative.

Lesson projections are based on survey results, participation in area facilities, and area demographics. The detailed breakdown of these projections is included as **Attachment #4**.

The projections include youth, adult, and special needs group, private, and semi-private lessons. The annual revenue projections over the first five years after facility opening are as follows:

Year One	\$257,990
Year Two	\$309,588
Year Three	\$346,739
Year Four	\$402,724
Year Five	\$422,860

These projections do not vary between facility Option #1 or Option #2. These projections are in line or more conservative compared to area facilities. For example, the Beede Swim and Fitness Center in Concord generates swim lessons revenue in this range with a much smaller population base and density. Therefore, there is an upside in these projections.

MANAGEMENT AND STAFFING

To help achieve these projections and realize additional upside potential, an investment in a focused Learn to Swim program director and good instructor training and compensation is critical. The program cost projections include additional part-time wages for a Program Director as well as a budget for instructor training and program marketing.

Section VI

AQUATIC FITNESS, SENIOR PROGRAMMING, AND SPECIAL NEEDS

FITNESS PROGRAMMING AND SENIOR PROGRAMMING

Aquatic fitness today is a rapidly growing field of exercise, fitness, and wellness. Aquatic fitness has expanded far beyond the stereotypical image of the senior citizens doing water aerobics. In addition to cross training in the water used by top sport teams and athletes, aquatic fitness includes cross training programs, hydro-spinning, vertical and deep water aerobics, water walking and running, Aqua Zumba and more. Current aquatic fitness programming in the Wellesley is largely focused on traditional aquatic fitness programming. This limited offering is compounded by the limited availability of classes and programming outside the mid-morning and mid-day class time slots that limit a wider range of participation.

The survey clearly indicated a broad demand for expanded aquatic fitness activities. Water walking/aquatic fitness was the number one paid programming activity identified by the 1 and 2-person household respondents as a primary reason they would use a new aquatic facility in Wellesley (37% of these respondents). Among 3+ person household respondents 16percent identified water walking/aquatic fitness as a primary reason. This indicates a broader interest in aquatic fitness activities that is currently not addressed in the market.

Expanded programming can include:

- Disabled and special needs aquatic fitness programs
- Senior specific aquatic fitness programming
- Home School fitness programs
- Wider variety of aquatic fitness programming
- Triathlon training and cross-training
- Sport specific cross training
- Health specific programs
 - Arthritis aquatic fitness programs
 - Cardio specific aquatic fitness programs
- More aggressive aquatic fitness programs for all levels of abilities and fitness levels
- Aquatic youth fitness programs

- Aquatic personal training
 - Aquatic or activity specific
 - Cross training
 - Linked to integrated dry-side/aquatic program

Design Needs for Aquatic Fitness

- Access to both warm (86-87 degrees) and cool (80-81 degrees) water
 - Supports a range of intensity
 - Supports a wide range of ages
- Good ramp and easy access
- Varying depths from 3 ½ to 4 ½ feet for shallow water work and deep water for vertical deep water exercise and water running
- Long stretches of constant depth for effective water walking and water running
- Soft low impact safety floor on teaching/fitness pool bottom

Projections

Based on the programming model the following aquatic fitness revenue in Year One is estimated. There is growth potential as programs continue to develop:

Aquatic Fitness	\$48,000
Personal Training	\$ 6,000
Low projection with significant upside potential	
Senior Programming	\$ 6,000
Can be increased with active partnership with senior living centers and organizations	
TOTAL	\$60,000

There is also a small revenue line item of \$25,000 for dry-land fitness that takes advantage of small cardio/strength room and workout room in the aquatic facility model. This may increase substantially with a more robust fitness program integrated with the ice rink facility.

Figure VI-1 shows images as examples of aquatic fitness programs.

Figure VI-1
Examples of Aquatic Fitness Programs



Traditional Class



Football Team cross-training



Hydro-Spinning



In-water treadmill



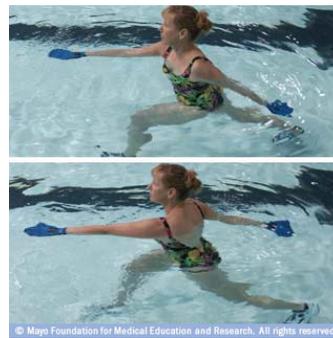
Aqua Zumba



Seniors



Deep water running



Water walking with resistance

Dry Lane Fitness

The survey indicated only 6% of overall respondents identified non-aquatic exercise activities as a most important feature of the aquatic facility. This finding can be a little misleading, since many of the users of the aquatic facility will likely use some small cardio or workout spaces in the facility. Study of successful community aquatic facilities in the area show that the most successful, such as the Beede Aquatic and Fitness Center in Concord and the Cornerstone Aquatic Center in West Hartford, CT have small cardio and workout spaces. These facilities indicate that these dry-side fitness components, even small spaces, are important elements in driving membership to the aquatic center. A Wellesley aquatic facility will meet the aquatic needs of the community without these dry-side workout spaces and features, but likely will not be as financially sustainable. A developer considering both the aquatic and ice center would likely consider dry-side spaces to both support the users of both facilities and drive membership in the aquatic facility.

LAP SWIMMING

Lap swimming is a hybrid of aquatic fitness and competitive training, with users ranging from the fitness swimmer enjoying swims on their own to avid masters swimmers and triathletes requiring organized and supervised coaching and training. The fitness swimmer is addressed in this section of the report.

The aquatic facility survey identified lap swimming as the number one primary reason that respondents would use a new aquatic facility in Wellesley. Sixty-one percent of all respondents indicated lap swimming as a primary reason they would use a new aquatic facility. There was a small difference between the proportion of 1- and 2-person household respondents, indicating a broad based interest and need.

The two major keys to meeting lap swimming needs and providing incentives to join and use the aquatic facility are the following:

- Adequate number of lap and training lanes to provide access to lap lanes for members even while swim teams or other programs are using the pools

- Access to lap lanes at all times the pool is open, not limiting to specific hours that don't meet everyone's needs

The availability during the day of both cool (80-81 degrees) and warm (85-87 degrees) lap lanes are a secondary driver of lap lane use, providing temperatures suitable to different ages and levels of intensity.

AQUATIC THERAPY AND REHAB

Aquatic therapy and rehab are also fast growing treatment options in the wellness and medical community as well as the athletic training field. While some physical therapy facilities now have their own therapy pools, the demand for warm, easily-accessible therapy water space is far outstripping the supply. The opportunity to create additional shallow warm-water space for therapy and rehab programs will be an important part of enhanced programming for the community and a revenue source for the aquatic facility. The aquatic facility survey indicated significant interest in aquatic therapy and rehab with 25 percent of 1- and 2- person household respondents indicating therapy/rehab as a primary reason to visit a new Wellesley Aquatic Facility. Ten percent of 3+ person household respondents indicated therapy/rehab as a primary reason.

Therapy and rehab space and facilities also support aquatic health and fitness programs, especially for seniors and those with special needs. There is potential to partner with local health care providers in this important area. This is particularly relevant and productive if this partnership can be integrated with athletic training providers in the ice rink facility, creating a more integrated overall therapy/rehab and athletic training provider servicing the entire facility. The aquatic facility financial projections currently show an outside therapy provider renting pool space at the aquatic facility. The current rental projection is a very conservative \$25,000 per year. This can increase significantly with an integrated program with a partner provider for the entire facility. Currently there is very minimal access to aquatic therapy/rehab in Wellesley.

Design Features Needed for Therapy/Rehab

Upwards of 65 to 70 percent of aquatic therapy and rehab can be done in the 85-87 degree warm-water teaching/fitness pool at the aquatic facility. A complete therapy/rehab program requires a purpose built therapy pool. Based on survey responses and market review, a therapy pool is included in both design options. Key elements of a therapy pool include:

- Very warm water – 92 degrees
- Varying depths from 3 ½ to 6 ½ feet
- Ability to induce currents and resistance
- In-water treadmill, hydro-spinners, or other training devices
- Lift access
- Support facilities such as exam/treatment room
- Private changing facilities (can utilize handicap accessible family changing rooms)
- Enclosed or partitioned facility providing privacy for patients in treatment sessions
- Pool can be small, averaging 250 to 350 square feet

Figure VI-2 shows images as examples of aquatic therapy and rehab.

Figure VI-2
Examples of Aquatic Therapy, Rehab and Handicapped Access



Cardiac Rehab



Regaining Movement



Therapy/Rehab Training



Therapy Pool



Handicapped Access



SPECIAL NEEDS PROGRAMMING

Aquatic activities are a very important part of overall special needs programming for those with wide ranging physical and mental disabilities. The range of pool spaces and temperatures at the proposed aquatic facility provides the opportunity to greatly expand these services, adding lessons, water safety, sport training and competition for the mentally handicapped, physically handicapped, visually impaired and the hearing impaired. These programs can be coordinated with local agencies and organizations. It is important that the programs offered address all of these elements, taking advantage of the unique features of the aquatic environment to enhance fitness, confidence, movement, and overall sense of well-being and accomplishment. Currently swim training and competitive programming for youth and adults is offered by the Wellesley S.T.A.R.S. Members of the STARS have competed in Special Olympics state, regional, national, and international competition. The STARS currently utilize the Regis College pool in Weston, MA. Local, state, and national organizations providing support for these programs and offering competitive events include Special Olympics, USA Paralympics, US Association of Blind Athletes, USA Deaf Sports, the Wounded Warrior Project, and other major organizations.

The proposed aquatic facility will be uniquely positioned to provide more ample space and facilities and key amenities than any other aquatic facility in the area. The aquatic facility will also allow special needs students to participate in a range of mainstream aquatic teams and activities. The need is high. This past season the lack of current training space limited the opportunity of a special needs student to participate on the Wellesley High School swimming team.

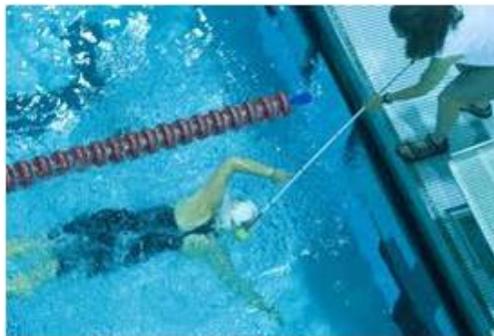
To support these programs, pool time is incorporated into the sample aquatic facility daily program schedules in Attachment #1 and #2. Pool time can include time and space in both the Main Pool and the Teaching/Leisure Pool to accommodate the wide range of disabilities, levels of ability and functionality, and the benefits of warm-water where needed. These time slots are often coordinated with training time for the local swim teams to provide the opportunity for mainstreaming the more accomplished disabled athletes

with able-bodied swimmers and maximizing the ability of the professional coaching staff to support the special needs programs.

The proposed aquatic facility will have the amenities and features to host local, state, and regional competition in aquatics in both Special Olympics and Paralympics. No Special Olympic or Paralympic events are specified in this analysis because these events are not viewed as revenue generators. Event time would be available, however, within the event schedule to host several events each year, ideally donating the pool time and support to the event and the organizing programs and organizations.

Figure VI-3 shows images of examples of special needs programming.

Figure VI-3
Examples of Special Needs Programming



Section VII EDUCATIONAL AND SAFETY PROGRAMMING

WATER SAFETY

The demand for lifeguards and trained aquatic instructors and staff makes water safety, CPR, AED, first aid, and lifeguard training classes very important. A recent article in “The Boston Globe” focused on the shortage of lifeguards in greater Boston. The proposed aquatic facility can play an enhanced role as a year-round lifeguard and water safety training center. Twenty percent of 3+ person household respondents indicated lifeguard and safety training as a primary reason to use the new facility. That is a percentage for a relatively narrow program and indicates potential demand and opportunity.

The proposed aquatic facility will be able to provide classes in all of these areas, not only providing valuable educational programs that can generate revenue for the facilities, but insuring a well-trained supply of staff necessary to meet the staff demands of the aquatic facility and area pools and beaches. Currently, the Wellesley Recreation Department has to travel outside Wellesley to provide training for its staff. The Lifeguard and Water Safety Instructor classes can also be offered in conjunction with Wellesley Public Schools to provide valuable training for students and help students get summer jobs as lifeguards, swim instructors, camp counselors, and other related aquatic-based jobs.

These programs include:

- Water Safety Instructor
- Aquatic fitness instructor training and certification
- Lifeguard, First Aid, CPR and AED training and certification
- Aquatic therapy and rehab training and certification

Figure VII-1 shows images of lifeguard training and certification.

Figure VII-1
Examples of Lifeguard Training and Certification



Section VIII

RECREATIONAL PROGRAMMING

Based on survey results, market research, and input during public meetings, the recreational component of the aquatic facility is important to residents. Family recreation was identified as a primary reason to use the aquatic facility by 73 percent of the 3+ person household respondents and by 23 percent of the 1- and 2- person household respondents (60% of all respondents). Recreation programming is also part of summer and vacation youth camps, which was a primary reason to use a new aquatic facility identified by 35 percent of 3+ person household respondents. Specific recreation/leisure amenities identified included slides and spray features, but these features ranked below other program amenities and features. A play area for children was the most identified recreation feature with 34 percent of 3+ person household respondents. The tot slide and spray features were indicated by 21 percent of 3+ person household respondents. These data indicates the need for recreation, but not limited to just play features. Market research shows that this will also be an important driver of memberships. Examples of successful community based pools in the region and nationally indicate that elaborate slides and expensive permanent aquatic features are not the most important element in meeting these recreational needs. While 73 percent of 3+ person household respondents identify family recreation as a major component, less than a third identify slides and spray features as important features.

Increased recreational opportunities and amenities are important to the overall community programming of a successful aquatic facility. No recreational activity is as family friendly and inclusive and multi-generational as aquatic activities. The current stereotype of aquatic recreation is a narrow view, focusing primarily on slides, splash pads, and other aquatic features that tend to appeal to a narrow and young age range and are often very costly. Aquatic recreation is much more than these features. The aquatic facility can include a wide range of recreational activities and features that appeal to a much wider age range, family friendly activities, and activities that form a bridge between fun recreational elements and fitness enhancing activities. It is important to remember that recreation and leisure pool

activities include both free/open swim time and programmed recreational activities. It is critical that programming and scheduling strike the right balance between open recreation time and programmed recreational programs. This issue is addressed more specifically in Section IV.

Recreational activities and classes can include a very wide range of activities, including but not limited to:

- Scuba (identified as a primary use by 9% of all survey respondents)
- Kayak and Canoe classes and safety
- Beginning Paddling
- Stand Up Paddling (can be linked with fitness programs)
- Inner-tube Water Polo

Figure VIII-1 shows images of recreational programming.

Figure VIII-1
Examples of Recreational Programming



Scuba



Kayaking



Stand up Paddling



Inner tube water polo

Many times the additional recreational opportunities in a traditional competitive rectangular pool are overlooked. The aquatic facility can also include many recreational amenities in the pools to provide additional recreational and fun activities for students, camp kids, and community families.

- Rock climbing wall in deep water (see photos)
- Water basketball hoop
- Pool Volleyball
- Inflatable pool climbing and play features (see photos)
- “Dive-in” movies
- Diving boards as recreational feature

Figure VIII-2 shows additional images of recreational programming.

Figure VIII-2
Examples of Recreational Programming



Water Basketball



Aqua-Climbing Wall



Wibits inflatable pool play features
Obstacle Course



PARTY FUNCTIONS AND BIRTHDAY PARTIES

Special events, especially children's birthday parties, are an important part of the facility community services and the overall revenue model of the facility. With the inclusion of recreational amenities parties will be a great year round programming and revenue opportunity. Birthday and party revenue for the proposed aquatic facility alone is projected at \$25,000 per year in Year One with upside only limited by the amount of pool time available for parties. **Figure VIII-3** shows an image of a party room in an aquatic facility.

Figure VIII-3
Examples of Aquatic Facility Party Room



OUTDOOR AMENITIES

If space on the site allows, it is important to provide outdoor access and outdoor spaces, even for indoor pools. Outdoor space can help promote greater use in the warm weather months, provide enhanced family amenities and provide support and space for event athletes and spectators and other program overflow. These spaces can sometimes be incorporated into necessary drainage fields or other required green space. Depending on the layout of the site these can include:

- Outside sundeck off the teaching/leisure pool including lounge chairs and tables
- Some shaded areas
- Grassy area for more lounging and relaxing
- Picnic type area with tables as part of the overall complex

Figure VIII-4 shows examples of outdoor spaces at aquatic facilities.

Figure VIII-4
Examples of Outdoor Spaces



Section IX

COMPETITIVE AQUATICS

Competitive aquatics, focused on but not limited to swimming, are major elements driving the vision and design of the proposed aquatic facility. The demand for training and event pool time and space in the Wellesley area and throughout greater Boston is intense. This demand has led to high pool rental costs very high. Pool rental rates for training space and swim meets are among the highest in the country. Training space is also linked closely with lap swimming space.

The proposed aquatic facility should meet the needs of the Wellesley High School teams, community based swim teams, USA Swimming clubs that draw members from Wellesley, and US Masters teams drawing members from Wellesley. These needs include both training and significant competition and event capabilities. The aquatic facility can also support a pre-team program that can provide a bridge between swim lessons and entry level swim and diving teams. Demand in the area for water polo space also exists with water polo and synchronized swimming clubs often using unused late evening and weekend hours. Competitive training programs for special needs youth and adults also need pool space as mentioned in the special needs section of this report.

WELLESLEY HIGH SCHOOL SWIMMING AND DIVING TEAMS

The Wellesley High School Men's and Women's Swimming and Diving Teams currently use pool time at Babson College for both training and swim meets. The six lane facility at Babson is inadequate to meet the teams' needs in many ways. The key issues are the following:

- Practice time
 - Current practice time is limited to 1 ½ hours/day five days a week. This is insufficient to provide adequate training. Two hour practices are preferred.
 - Current practices are either at 7:00 to 8:30 or 8:30 to 10:00pm during school nights. Clearly this is detrimental to optimum student athlete performance both in the pool and in the classroom.

- Practice space
 - Current space is limited to six - 25 yard lanes
 - When divers are training with the team, the team is reduced to swimming in just 4 lanes.
 - Limited space requires the teams to limit the number of members, requiring cuts and limiting opportunities
 - The swimming teams are now one of the only teams at Wellesley High School to have cuts. The goal of the high school is to continue to provide opportunities to all students.
 - The high school's goal is to not require cuts and increase the size of the high school swim teams.
 - Limited lane space restricts the team from meeting the needs of any special needs student athlete who would like to join the team, as was the case this past swimming season.
- Meet capabilities
 - The Babson College pool only supports high school dual meets
 - The high school cannot host league or regional meets or larger invitational meets, which limits the competitive growth of the swimming and diving team.

Ideally, the Wellesley High School would like two hours of training time in the after school time slot with a minimum of eight lanes to support and encourage participation growth and competitive excellence. They would also like a venue that could host bigger swim meets and better support the overall program and better suit the schedules of the student athlete. The high school would like a pool that they can identify as their home pool, including team record boards and signage.

YEAR ROUND SWIM TEAMS

There are four to five USA Swimming Clubs that have members from Wellesley on their team. These clubs include young swimmers ranging from ages six to college swimmers, with the largest percentage in the nine to fourteen year old range. These clubs face common challenges, including lack of training space, inadequate meet facilities, the need to use multiple pools on a rotating basis, waitlists to join the team, and difficulty in developing a feeder program providing a progression from swim lessons to the club team. These area teams will all vie to rent training space in the aquatic facility. The limit is only how much space can the aquatic facility rent out without cutting back programs services and membership access or cutting back on space for Wellesley based school and community teams and programs. The aquatic facility should look for one or more USA Swimming Club team(s) that will be a good

partner in working with the aquatic facility to help develop the bridge progression from learn to swim to pre-team to entry level swim teams to high school and club swimming. A good club partner will work closely to provide a seamless transition between aquatic facility programming and club programming.

WELLESLEY SWIMMING ASSOCIATION

The Wellesley Swimming Association is member of the Winter Suburban Swim League and trains and competes from October to March. This community-based team provides opportunities for a large number of swimmers in the Wellesley area but is also limited in space and pool time. The team currently rents pool time in a very inconvenient mix of four pools: Wellesley College, Dana Hall, Regis College, and Babson College. The lack of pool space requires team tryouts and limits the opportunities available to Wellesley youth.

PRE-TEAM PROGRAMS

Some type of pre-team or competitive stroke program is important to provide a bridge between swim lessons and organized swim teams. This swimming continuum between lessons to Pre-Team to Swim Team also helps drive more swim lessons as there is a clear path through the full range of swimming lessons. An organized and accessible pre-team program is not only a great feeder program for the area swim teams but also a great marketing tool for the proposed aquatic facility's learn to swim programs.

DIVING IN THE AREA

There are several active USA Diving teams in greater Boston that include Wellesley residents. These programs include Boston Area Divers, Charles River Diving, and South Shore Diving. If the proposed aquatic facility has both one and three meter diving boards it is likely that one of the diving programs would like to rent space for a satellite training center. The diving clubs currently utilize the area college pools, particularly Boston University and MIT because of their better diving programs.

The inclusion of one meter boards at the aquatic facility is necessary for the high school teams and meets. The addition of three meter boards provides the added opportunity to support

collegiate invitationals and league meets as well as USA Diving club teams and competitions. The addition of the three meter boards only adds another foot and a half to the pool depth in the diving area and only creates a small incremental operating expense.

WATER POLO AND SYNCHRONIZED SWIMMING

There are both water polo clubs and synchronized swimming teams in the Boston area that attract Wellesley residents and are always looking for pool time and space that suits their needs. Both water polo and synchronized swimming require deep water (minimum target of seven feet depth) which limits the number of optimum facilities they can use. The aquatic facility can be a good venue for these sports, especially since these sports often rent later evening and weekend hours that otherwise go unused or are in limited demand.

TEAM TRAINING RENTAL STRUCTURE

Pool rental rates in the Boston area are the highest in the country. Current area teams pay an average of between \$18.00 and \$25.00 per 25yard lane per hour at the local college and school pools. Rental rates at the large collegiate facilities are even higher. The 50 meter lane rentals at MIT average \$57.00 per lane per hour. Rental space at Harvard's 50 meter pool is not regularly available. Local demand from 50 meter training space is great and provides opportunities for additional training rentals on under used times over weekend mornings and evenings.

Projected "retail" lane rental rates for the proposed aquatic facility are as follows:

25 yard lanes:	\$30/lane/hour
50 meter lanes:	\$60/lane/hour

Discounts of up to 15% are recommended for volume users making long term rental/lease commitments. This discount brings the rental rates a regular user team would pay to just a little over what they currently pay for inconsistent and inadequate hours and space. Based on projected space available at the proposed aquatic facility and the needs of local teams rental revenue for the aquatic facility in Year One is projected to be the following:

Option #1 \$222,292
 Stretch 25 yard pool option with 15 x 25 yard lanes

Option #2 \$392,168
 50 meter pool option with 10 x 50 meter lanes or 22 x 25 yard lanes

Detailed assumptions underlying these revenue estimates for Options #1 and #2 are included in **Attachment #9C** and **Attachment #10C, respectively**.

COMPETITION EVENTS

One of the key differentiating factors between Options #1 and #2 is the event capabilities. Some significant event capabilities are very important to the swim teams in the area, including the Wellesley High School team. The immediate needs of Wellesley residents and programs can be met with an aquatic facility that can support meets of between 400 to 600 swimmers and accommodate 500 spectators.

The broader regional market has significant needs for facilities that can accommodate meets with 700 to 900 competitors and 700 spectators, especially if the facility includes a 50 meter pool. While a 50 meter event facility is not a major specific need of Wellesley residents as a whole, the ability to host these larger short course (25yard) and long course (50meter) meets presents a revenue opportunity for the facility developer and management team. A 50 meter pool also provides 22 x 25 yard lap and training lanes which significantly enhances the space available for community, team, and member lap swimming, training, and recreational space and maximizes the benefits to the high school team, Wellesley residents, and the greater community.

The competition section of this report and the analysis is designed to determine the potential event opportunities and financial implications for the aquatic facility as well as the impact of the design options on events. The event potential is also weighed against the potential disruption of the facility's-member programs. The right balance needs to exist between events and regular programming. If events are an important part of the programming and

business model of a new aquatic facility, the schedule must minimize any disruptions of daily facility programs.

An event calendar and revenue projection worksheet has been developed in order to evaluate the event potential and financial impact of events on facility operations. This schedule is based on current New England Swimming events and has been developed in conjunction with potential host teams.

It identifies the reasonable potential events with an annual calendar that also identifies the number of competitors and spectators for each event. The vast majority of these events are hosted by outside club teams. Using this calendar and participation numbers we calculate the event revenue of each event and annual overall totals. It also estimates the event revenue generated by the host of the event. The Event Calendar and Revenue Analysis for both options are attached as follows:

- Option #1 **Attachment #5**
- Option #2 **Attachment #6**

Event Rental Rates

Meet facility rental rates in the Boston area are some of the highest in the country. Current rental rates and all related facility expenses for large meets can be as high as \$6,500 to \$7,000 per day for large meets. Rental rates for the proposed aquatic facility are projected in a range approximately 20 to 25 percent below the rates charged by MIT and Boston University. Even with this discount, these rates are still significant enough to create profitable revenue stream for the aquatic facility.

The proposed rates are as follows:

<u>Main Competition Pool (all lanes)</u>	<u>Option #1</u>	<u>Option #2</u>
One Day	\$3,000	\$4,500
Half-Day	\$1,750	\$2,750
Hourly	\$ 450	\$ 600

<u>Main Competition Pool (10 lane course)</u>	<u>Option #1</u>	<u>Option #2</u>
One Day	\$2,250	\$2,500
Half-Day	\$1,300	\$1,500
Hourly	\$ 300	\$ 300

<u>Teaching/Fitness Pool (used as warm-up pool for 50 meter meets)</u>		
One Day	\$1,000	\$1,000
Half-Day	\$ 600	\$ 600
Hourly	\$ 150	\$ 150

<u>Diving Space (1 and 3 meter boards)</u>	<u>Same for both options</u>
One Day	\$1,000
Half-Day	\$ 600
Hourly	\$ 150

Based on these rental rates and the projected event calendar the event rental revenue projections for events are as follows:

	<u>Year One</u>	<u>Year Two</u>
Option #1	\$ 46,950	\$ 78,250
Option #2	\$ 98,610	\$164,350

Total aquatic event revenue based on competitive events including rental, sales commissions, and food concessions are the following:

	<u>Year One</u>	<u>Year Two</u>
Option #1	\$ 78,539	\$130,899
Option #2	\$150,359	\$250,599

The Year One revenue is estimated at 60 percent of Year Two revenue because the aquatic facility will not get a full event calendar the first year until the event management of the facility has been shown to be effective. Event revenue calculations do not include any potential parking fees. Event revenues are based entirely on outside groups hosting events and renting the facilities.

Section X

MEMBERSHIP PROGRAMS

Virtually all public and private aquatic facilities now utilize a membership model for facility use as well as daily access or guest rates. The membership model for the proposed aquatic facility should include a Wellesley resident discount for membership to best meet the needs of the broad base of Wellesley residents. This discounted resident membership would effectively provide a resident discount on specific class fees and other facility benefits. An overview of the membership and usage fees of aquatic facilities in the Wellesley area, the region and selected national facilities was developed to provide a market rate analysis. This summary of market membership and user fees is included in this report as **Attachment #7**.

It is somewhat difficult to compare aquatic facility rates with full service private health clubs. The projected membership and usage rate structure for the proposed aquatic facility is positioned to be more than that of community/public aquatic facilities such as the Wayland Community Center but less than that of the private aquatic facilities in the region that also have significant fitness components. The proposed pricing structure is below the full service YMCA memberships and well below the membership rates of the private fitness clubs such as the Longfellow Sports Club and the Boston Sports Club.

These projected rates are used in the projected membership revenue worksheet. Actual membership projections are based on input from area facilities, survey information, and Wellesley and area demographics. The percentage breakdown of membership categories is based on data from area clubs such as the Beede Swim and Fitness Center in Concord.

The detailed membership projection breakdown for Option #1 is included in Attachment #7. Option #2 offers some small added membership value with the added lanes and the 50 meter pool and is projected to generate a 5 percent increase in membership revenue over Option #1.

Membership and daily usage fee projections for the proposed aquatic facility are as follows:

	<u>Year One</u>	<u>Year Two</u>
Option #1	\$720,643	\$847,815
Option #2	\$756,675	\$890,206

These estimates may prove to be somewhat conservative. The membership revenue at the Beede Swim and Fitness Center in Concord is double these Year One projections.

Section XI

DESIGN CONCEPTS AND FEATURES

The goal of this study is to develop basic design concepts and requirements for both the pool features and configurations and the necessary spaces and amenities needed to support the proposed programming and usage. To achieve this and analyze impact on both programming and design two recommended options have been developed. A baseline comparison option is also discussed as a means to support the need for Option #1 or #2.

The design and amenity options are based on the aquatic needs of the community and prior program analysis. They are developed to achieve the most cost effective means to support the proposed programming in a facility that can also generate the revenue needed to support the facility. The design option support areas and spaces assume a standalone aquatic facility. There may be space savings when combined with an ice center, including shared common and support areas. The potential shared space is identified for each design option.

These design options are only suggestions for developers as to the design elements that meet Wellesley aquatic needs. Final design can include combinations of these elements or some hybrid of the two designs that best integrate with the other facilities on the site and fit within the site.

Option #1 meets the current identified and foreseeable future program and usage needs of the Wellesley residents and supports the area teams in short course training and mid-size events. It will be an important Wellesley area asset and will be the top community based pool in the area. An aquatic facility with fewer lap lanes and less programmable space than Option #1 will not adequately meet the needs of Wellesley residents.

Option #2 offers seven additional lap lanes and programmable space to provide greater programming flexibility, free time and space, and room for enhanced future program and usage growth. It also provides support for 50 meter training and a year round event calendar.

Option #2 becomes a regional asset in New England and will attract greater usage year round, providing additional revenue potential for a developer considering the project.

SITE

The 900 Worcester site may present building footprint and parking challenges to the overall design of both the proposed aquatic facility and proposed ice rink. Efficient integration and sharing common spaces between the two facilities such as lobby, office space, concessions, and other support areas will be critical to maximizing the utilization of the site. This study did not apply possible limitations of site size and parking capacity in evaluating the optimum aquatic facilities to meet the needs of Wellesley residents. It is assumed that any site limitations would be addressed in actual development designs and proposals.

Parking-Daily and Regular Use

The programming and design model of Option #1 have relatively similar daily parking needs with an estimated 10-15 percent increased demand for parking in Option #2 over Option #1. Daily traffic and usage during school year weekdays will peak between 3:30 pm and 7:00 pm each day. Based on the experience of other facilities, the proposed programming, and the anticipated usage for this facility, during these peak hours a maximum of 80 parking spaces (including handicap spaces) for Option #1 and 90 spaces for Option #2 will be needed. Throughout the rest of the day the traffic will be relatively even, with a moderate increase during the pre-work/school hours between 5:30 am and 7:30 am. Regular weekend use during the school year will be concentrated between the hours of 10:00 am and 5:00 pm and will be spread out evenly during the period, with team practice occurring prior to noon. The 80 spaces for Option #1 and 90 spaces for option #2 will support this weekend use load.

Summer weekday use will be spread out during the day, with teams and lessons in the morning and recreational and community use in the afternoons and evenings. The eighty to ninety spaces will be sufficient for this use load. Summer weekends will have some afternoon or holiday use peaks which may require some additional parking, increasing the need to 100 to 120 spaces. These might be accommodated if overflow parking in the neighboring office complex is available.

Parking-Events

Swim meet and event parking at the Aquatic Center will be largely driven by the spectator attendance. In the vast majority of swim meets the spectators and competitors come in the same car. Weekday evening events such as high school dual meets and small recreational meets will require an estimated additional 100 spaces. Large USA Swimming and High School invitational meets will be conducted mostly on Friday late afternoons through Sunday evening. The largest of these weekend meets in Option #1 will require an estimated additional 200 spaces. This parking need is anticipated to be required approximately six to ten weekends per year. Option #2 will host larger events and would require an estimated additional 300 to 325 spaces during the largest meet weekends, occurring nine to thirteen weekends per year. If overflow parking in the neighboring office complex is available, most of demand for additional parking could be met.

Drop Off Access

Many of the daily users of the pool and swim meet/event competitors will be dropped off by parents. It is very important that the driveway access at the main entrance to the facility have ample space for car circulation and drop off and pick up access. A bottle neck at the drop off point can negatively impact the programming at the facility.

Detailed Options

It will be up to the developers to present the site plan as part of their proposals for developing the site. Specific spaces and square footage details are in the Space Allocation Worksheet included as **Attachment #8**.

OPTION #1

Square Footage:

- Total Gross Square Footage: 44,869
- Building footprint: 40,854
- Potential shared square footage: 7,409

Main Competition Pool

- 121' x 75' (25 yard)
 - 10 x 7.6' lanes
 - 16 x 25 yard lanes across the pool (7' wide)
 - 4' moveable bulkhead
 - Depth: 13.5' at diving/start end to 6.5' at 25 yards (normal bulkhead position) to 4' at shallow end feet over most of pool with diving well at 13'
 - Small stairs cut out at shallow end of pool (eliminates 3 x 25 yard lanes)
 - Potential for ramp access or ADA lift
 - Total Pool Volume: 500,000 gallons
 - 9,075 square feet of pool surface area
 - Diving
 - 2 x 1 meter boards
 - 1 x 3 meter boards
 - Deck space: 5,974 square feet
 - 16' at starting end
 - 12' at shallow end
 - 14' on side opposite spectator seating
 - 12' on side of spectator seating
 - Temperature: 80 degrees
 - Timing System and Digital Scoreboard
 - Seating
 - Second level spectator seating: 500
 - On deck athlete seating: 300

Teaching/Leisure Pool

- 75' long with variable width at zero entry/leisure area
- 4 x 25 yard lap lanes
- Depth: 0' to 4.5'
- Total Pool Volume: 120,000 gallons
- 4,000 square feet of pool surface area
- Deck Space: 2,967 square feet
 - 8' around all sides
- Some recreational aquatic features
- Ramp and steps access
- Temperature: 85-87 degrees
 - Viewing area off of the lobby for learn to swim and other programs in the teaching/leisure pool (separate from spectator seating for main pool)

Therapy/Rehab Pool

- 20' x 14'
- Depth: 4' to 6'
- Volume: 10,500 gallons
- Temperature: 92 degrees
- Lift Access

Spa/Hot Tub

- 144 square feet
- Temperature 101-102 degrees

Overall Program implications

- Provides 10 lanes of training space for area swim teams
- The bulkhead provides program separation, especially between lap swimmers and teams training, meet competition and warm-u lanes, and recreational programming from team or lap swimming. This provides a much better shared user environment than the 25 yard by 25 meter pools with no separation between team and lap lanes and meet competition and warm-up lanes.
- Accommodates mid-size meets to support High School and USA Swimming meets
- Provides for 25 yard water polo course with deep water that can be expanded to 25 meter
- Short Course 25 yard competition
 - Provides 10 competitive lanes and 6 warm-up lanes without using the Teaching/Leisure pool

Facility Amenities and Support Spaces:

Option #1 includes the following basic amenities:

- Locker Room space
 - General locker rooms 2,200 square feet
 - Family/handicap changing rooms 800 square feet
 - Therapy changing rooms 200 square feet
- Administrative Areas
 - Management and staff office space 895 square feet
- Fitness Area
 - Cardio/Strength Space: 1,200 square feet
 - Workout room/studio: 1,400 square feet
- Function and Common Space
 - Lobby: 600 square feet
 - Front Desk/Access Control 175 square feet
 - Classroom/Function Space/Party 1,200 square feet
 - Restrooms in lobby and in seating level
 - Concession space with warming/catering kitchen
 - Storage for function space, fitness, and pool deck
 - Spectator concourse on second level

Figure XI-1 shows a sample pool sketch of the main pool for Option #1. The Option #1 recommendation is slightly longer than the sample to accommodate five lanes and the ramp in the shallow end of the pool. Figure XI-2, Figure XI-3 and Figure XI-4 shows examples of pool options.

Figure XI-1
Sample Pool Sketch Option #1

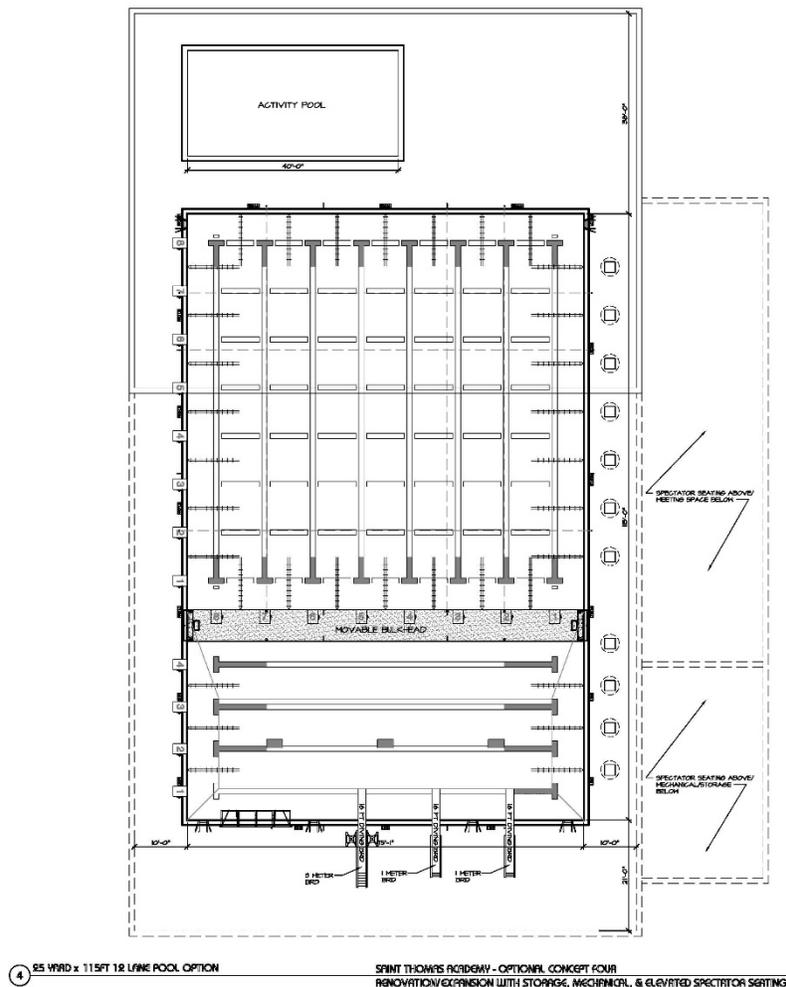


Figure XI-2
Example of Option #1 Main Pool



Figure XI-3
Example of Teaching/Leisure Pool Options #1 and #2

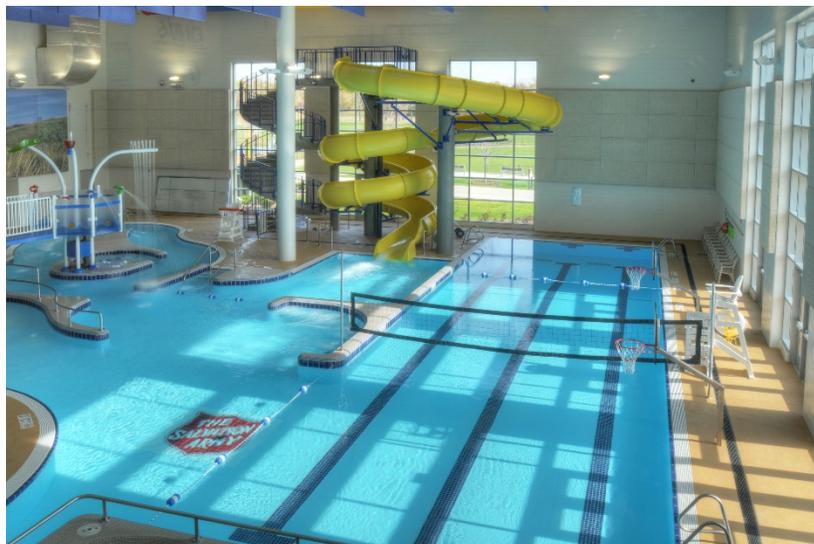


Figure XI-4
Example of Small Therapy Pool Options #1 and #2



OPTION #2

Square Footage:

- Total Gross Square Footage: 54,116
- Building footprint: 48,561
- Potential shared square footage: 8,096

Main Competition Pool

- 168' (51.2 meters)' x 75' (25 yard)
 - 10 x 7.6' lanes 50 meter lanes
 - 22 x 25 yard lanes across the pool (7' 5" wide)
 - 4' moveable bulkhead
 - Diving
 - 2 x 1 meter boards
 - 2 x 3 meter boards
 - Depth: 13.5' at diving/start end to 6.5' at 25 yards (normal bulkhead position) to 4' at shallow end feet over most of pool with diving well at 13'
 - Small stairs cut out at shallow end of pool (eliminates 3 x 25 yard lanes)
 - Potential for ramp access or ADA lift
 - Total Pool Volume: 750,000 gallons
 - 12,600 square feet of pool surface area
 - Deck space: 8,400 square feet
 - 18' at starting end
 - 14' at shallow end
 - 16' on side opposite spectator seating
 - 14' on side of spectator seating
 - Temperature: 80 degrees
 - Timing System with full color scoreboard
 - Seating
 - Second level spectator seating: 700
 - Some seating collapsible to create additional function space when not in use
 - On deck athlete seating: 500

Teaching/Leisure Pool (same as Option #1)

- 75' long with variable width at zero entry/leisure area
- 4 x 25 yard lap lanes
- Depth: 0' to 4.5'
- Total Pool Volume: 120,000 gallons
- 4,000 square feet of pool surface area
- Deck Space: 2,967 square feet
 - 8' around all sides
- Some recreational aquatic features
- Ramp and steps access
- Temperature: 85-87 degrees

Therapy/Rehab Pool (Same as Option #1)

- 20' x 14'
- Depth: 4' to 6'
- Volume: 10,500 gallons
- Temperature: 92 degrees
- Lift Access

Spa/Hot Tub (Same as Option #1)

- 144 square feet
- Temperature 101-102 degrees

Amenity and Common Space Option #2 Updates

- Slightly increased general locker room space
- Slightly increased Lobby spaces
- 200 Square feet added to classroom/function space
- No new amenities or support areas added in Option #2

Overall Program implications

- Training
 - Provides 7 more short course lanes than Option #1 for training and lap swim
 - Provides increase revenue generating potential
 - Provides great scheduling flexibility for teams, lap swimmers, recreation, and other user groups and programs
 - Provides one of the only 50 meter indoor pools in the region, creating event and training opportunities not just for the Wellesley area but for the entire region
 - Can continue to offer lap lanes in the main pool during short course competition
- Competition and Events
 - Event facility that can accommodate large USA Swimming and collegiate meets

Figure XI-5 shows a sample pool sketch for Option #2.

Figure XI-5
Sample pool sketch for Option #2

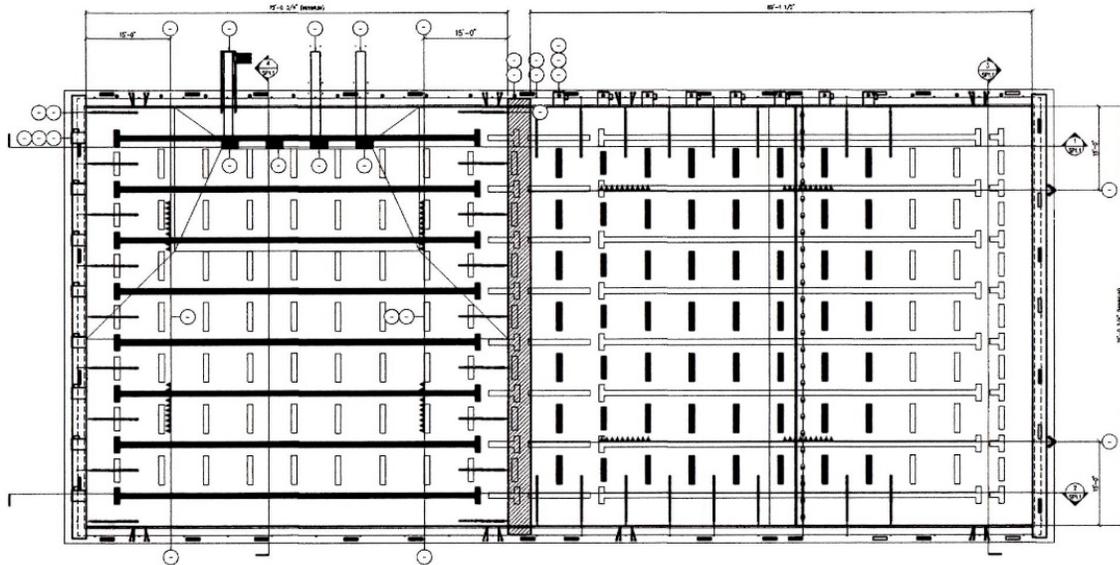


Figure XI-6 shows an example of Option #2 main pool.

Figure XI-6
Example of Option #2 Main Pool



BASELINE COMPARISON OPTION

The Baseline Comparison Option was originally considered in the study as the most basic design option for the aquatic facility. During research it became clear that this option would not meet even the basic needs of the Wellesley community and would not provide any real or significant additional benefits or opportunities for residents and user groups. It also did not have the revenue producing potential to sustain operation. The design elements are retained in this report to show what does not meet the community needs.

Square Footage:

- Total Gross Square Footage: 27,248
- Building footprint: 25,488
- Potential shared square footage: 4,246

Main Competition Pool

- 75'x 67'
 - 8 x 7.5' 25 yard lanes
 - Depth: 12' to 8'
 - Diving:
 - 2 x 1 meter boards
 - Total Pool Volume: 265,000 gallons
 - 5,025 square feet of pool surface area

- Deck space: 4,368 square feet
- Temperature: 80 degrees
- Seating
 - Second level spectator seating: 200
 - On deck athlete seating: 150

Teaching/Leisure Pool

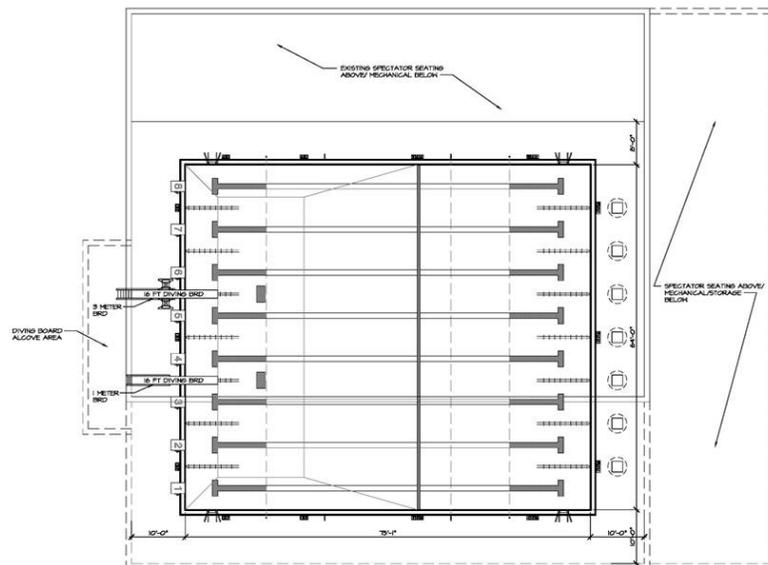
- 60' x 32'
- 75' long with variable width at zero entry/leisure area
- 4 x 20 yard lap lanes
- Depth: 3' to 4.5'
- Total Pool Volume: 54,000 gallons
- 1,920 square feet of pool surface area
- Deck Space: 1,728 square feet
 - 8' around all sides
- Ramp and steps access
- Temperature: 85-87 degrees

No Therapy Pool in Baseline Option

No Spa/Hot Tub in Baseline Option

Figure XI-7 and Figure XI-8 show sample baseline comparison options.

Figure XI-7
Sample sketch of the Baseline Comparison Option



1 25 YARD x 64 FT 8 LANE POOL OPTION

SAINT THOMAS ACADEMY - BASIC CONCEPT
RENOVATION/EXPANSION WITH STORAGE, MECHANICAL, & ELEVATED SPECTATOR SEATING

Figure XI-8
Example of Baseline Comparison Option



Section XII
PROJECT COST ESTIMATES

With only general design concepts and requirements only very general project cost estimates can be provided. These cost estimates are based on project cost estimates from comparable aquatic facilities. These estimates represent full project costs, including hard construction costs, soft costs, such as architecture and design fees, and contingencies. These should only serve as rough estimates. They are calculated as standalone aquatic facilities and do not reflect anticipated cost savings or efficiencies gained through common spaces shared with the ice rink facility proposed for the same site. Additional project cost savings may also be realized through the building of the ice rinks and aquatic facilities by one developer as one project. A square foot project cost range of \$320 to \$330 per square foot is used and represents mid-range construction materials but top of the line pool and air handling mechanical systems to insure excellent water and air quality, the two most important factors in any pool.

Option #1

44,869 square feet

Rough Cost Estimate: \$14.4 to \$14.8 million

Estimated Cost with common space sharing: \$13.3 to \$13.6 million

Option #2

54,116 square feet

Rough Cost Estimate: \$17.3 to \$17.9 million

Estimated Cost with common space sharing: \$16.0 to \$16.5 million

The cost savings achieved from common space sharing is based on the square foot cost of the shared space at \$320 to \$330 per square foot. Because it will be a shared, half of the cost of the shared space removed from the estimates for a standalone facility.

Section XIII

AQUATIC CENTER OPERATIONAL AND MECHANICAL SYSTEMS

The operating cost estimates used in this report are based on the use of state of the art equipment and systems that meet the following criteria:

- Energy efficiency
- Low annual operation costs
- Low long term maintenance
- Extended lifespan
- Minimal water usage
- Minimize environmental impact
- Minimal impact on programming and pool down time due to regular maintenance

The following is a review of the key mechanicals components in the mechanical and operational systems.

FILTER SYSTEM

A regenerative media filter system, using Perlite media is strongly recommended. (The system referenced in this report is the Neptune Benson Defender System.) These systems have the following advantages over the traditional high rate sand filters typically used.

- Filters down to 1 micron in particle size compared to 15-30 microns for traditional sand filters resulting in cleaner and safer water
- Requires only approximately 25-30% of the space necessary for the filters in the mechanical room
- Reduced total water used for the pools (backwashing, etc.) by approximately 90%, which, for example, in Option #1 would result in savings of 450,000 – 550,000 gallons of water per year.
- Similar reductions in chemically treated waste water to sewer
- Reduced water usage and the reduced size of the filters also results in annual operational savings averaging 20-25% annually. These include the following:
 - Reduced chemical usage based on less replacement water
 - Reduced heating costs based on less replacement water
 - Reduced electrical costs based on smaller pump capacities needed
- Smaller total mechanical rooms spaces resulting in lower construction costs
 - These space savings in these designs were utilized to increase storage and on deck restroom facilities
- Defender systems earn LEED Certification credits for environmental impact
 - Earns 1 credit for Optimizing Energy Performance

- Earns 1 credit for reduction in water usage

UV (Ultra-Violet) SYSTEMS

UV systems are defined as a secondary water treatment. The system utilizes UV light rays to disinfect the water passing through the system. The UV rays are more efficient than even chlorine in killing key bacteria, including cryptosporidium. While current health codes still require the same levels of residual chlorine in pools, the UV system does the work of the chlorine, resulting in significant less chlorine use. There is also less breakdown of the chlorine in reaction, resulting in much fresher air and helping to reduce that pool “chlorine smell” or bad air. The new CDC (Center for Disease Control) Model Aquatic Health Code recommends use of UV systems in all pools in the future. Key advantages of the UV Systems are as follows:

- Controls the byproducts of chlorine disinfectant, known as chloramines, reducing the odor, irritation, and enhanced corrosion in pools
- Significantly improved air quality
- Kills chlorine resistant pathogens such as cryptosporidium, which is responsible for 75% of pool related illnesses reported to the CDC
- Energy savings by improving water quality
- Reduced consumption of chlorine, resulting in cost savings

As UV continues to be utilized, the minimal required residual levels of chlorine may be reduced in the future for pools with UV, resulting in additional future savings.

VARIABLE FREQUENCY DRIVES (VFDs)

VFDs are electronic monitoring and control systems that manage pump speed and electrical usage based on usage demand and programmable to minimize energy use while maximizing filtering effectiveness.

CHEMICAL AND SYSTEM CONTROLLERS

State of the art chemical and system controllers not only efficiently control chemical levels and feed but assist the Certified Pool Operator (CPF) to remotely monitor key pool systems via computer internet connections to proactively alert management of any problems. Both the effective consistent control of chemicals and the effectiveness in alerting management to any issue when the problem is still small result in safer and more cost effective pools.

POOL TECHNOLOGY

The maintenance costs of the pools are based on Myrtha stainless/PVC pool tank technology which eliminates the need for regular concrete/plaster pool resurfacing and reduces long term maintenance costs.

POOL HEATERS

State of the art high efficiency pool heaters are used in this analysis. The option exists to explore alternate energy sources to heat pool water, such as passive solar. Overall building geo-thermal systems can also be energy efficient. Actual decisions on overall building heating and cooling systems would be made in conjunction with architects and engineers during the design stage of the project.

SHARED HEAT EXCHANGE WITH ICE FACILITY

The option and technology exists to link the heating and cooling systems of the aquatic and ice facilities to reduce costs and maximize efficiency through exchange of heat from the ice rink to the pool. A good regional example of this technology is the new Chelsea Piers facility in Stamford, CT.

ENVIRONMENTAL IMPACT

As indicated above, the Defender filter system earns LEED certification credit for energy efficiency and minimization of water usage.

The costing of the project also includes the use of Myrtha Pool building technology which represents a savings of approximately 45-50% in embodied energy during the building process.

The energy savings involved in use of VFDs, UV systems, high efficiency heaters, and state of the art chemical controllers all contribute to energy savings and reduce environmental impact. The use of these energy saving devices often qualify for incentive funding from local utilities and should be explored during the design and costing process. Based on analysis by the architect and engineers during the design phase, additional environmentally friendly

technology and alternate energy sources can also be evaluated for their impact and return on investment.

Section XIV

FINANCIAL PROJECTIONS AND BUDGETS

Financial models have been developed for Options #1 and #2 based on the projected operating costs, programming model, event projections, and other costs and revenue streams. Specific backup calculations for learn to swim, events, membership, and daily usage are referenced in the program related sections (Section IV, Section VIII, and Section IX) and in attachments to this report. The analysis includes a breakdown of expenses into two categories: Operating Expenses and Program Expenses. Operating Expenses are the fixed costs of utilities, maintenance, lifeguards, equipment, office expenses, and facility staff. Program Expenses are the instructors, marketing, credit card fees, and other costs associated directly with specific programs and vary based on the program participation. Revenue is broken down into Facility Revenue and Program Revenue. Facility Revenue includes user fees, memberships, and rental revenue. Program Revenue includes specific class fees and program registrations linked to specific programs. These expenses and revenues are broken down in the manner to provide the ability to analyze the return on investment and costs of specific programs to help maximize program development and use of the pools space and time.

FINANCIAL OPERATING SUMMARIES

Five-year financial summaries, including annual profit and loss projections, for both Options #1 and #2 appear in **Figure XIV-1** and in **Figure XIV-2**, respectively.

Figure XIV-1
Option #1 Financial Summary
Wellesley Aquatic Facility

Wellesley Aquatic Facility						
Financial Summary						
Option #1						
EXPENSES	Year Zero	Year One	Year Two	Year Three	Year Four	Year Five
OPERATIONAL EXPENSES	\$ 105,850	\$ 967,418	\$ 1,022,389	\$ 1,073,231	\$ 1,109,996	\$ 1,163,440
Utilities	\$ -	\$ 224,365	\$ 236,342	\$ 244,869	\$ 250,900	\$ 259,642
Maintenance	\$ -	\$ 39,300	\$ 52,214	\$ 65,140	\$ 66,045	\$ 79,725
Equipment and Supplies	\$ 4,000	\$ 12,500	\$ 13,000	\$ 13,520	\$ 14,061	\$ 14,623
Staff	\$ 99,350	\$ 618,123	\$ 642,728	\$ 668,317	\$ 694,930	\$ 722,607
General Office	\$ 2,500	\$ 68,130	\$ 73,104	\$ 76,385	\$ 79,061	\$ 81,844
Miscellaneous	\$ -	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000
PROGRAM EXPENSES	\$ 10,100	\$ 188,764	\$ 221,568	\$ 245,045	\$ 270,942	\$ 284,261
Community Educational Programming	\$ -	\$ 7,550	\$ 8,495	\$ 9,075	\$ 9,466	\$ 9,877
Fitness and Therapy	\$ 500	\$ 32,350	\$ 36,940	\$ 39,755	\$ 41,655	\$ 43,651
Learn to Swim	\$ 8,000	\$ 110,876	\$ 130,197	\$ 144,284	\$ 165,096	\$ 173,030
Camps and Clinics	\$ -	\$ 15,600	\$ 20,290	\$ 24,249	\$ 25,412	\$ 26,632
Team Programs	\$ 1,600	\$ 22,388	\$ 25,646	\$ 27,682	\$ 29,312	\$ 31,072
DEBT SERVICE	\$ -					
PROPERTY TAXES	\$ -					
TOTAL EXPENSES	\$ 115,950	\$ 1,156,183	\$ 1,243,957	\$ 1,318,276	\$ 1,380,937	\$ 1,447,701
REVENUE						
FACILITY REVENUE	\$ -	\$ 1,105,974	\$ 1,306,191	\$ 1,409,092	\$ 1,472,246	\$ 1,538,359
Camps and Clinics	\$ -	\$ 11,500	\$ 11,960	\$ 12,438	\$ 12,936	\$ 13,453
Club and Training Rental	\$ -	\$ 222,292	\$ 236,317	\$ 246,931	\$ 255,862	\$ 265,136
Events	\$ -	\$ 108,539	\$ 164,649	\$ 186,584	\$ 192,652	\$ 198,934
Therapy, Rehab, Health	\$ -	\$ 25,000	\$ 26,250	\$ 27,563	\$ 28,941	\$ 30,388
Sales	\$ -	\$ 8,000	\$ 9,200	\$ 9,936	\$ 10,433	\$ 10,954
Memberships/Daily Usage	\$ -	\$ 720,643	\$ 847,815	\$ 915,640	\$ 961,422	\$ 1,009,493
Facility Sponsorships/Contributions	\$ -	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000
School District or Park and Rec Usage Fees	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
PROGRAM REVENUE	\$ -	\$ 434,490	\$ 517,563	\$ 575,952	\$ 643,398	\$ 675,567
Community Educational Programming	\$ -	\$ 17,500	\$ 20,125	\$ 21,735	\$ 22,822	\$ 23,963
Fitness and Therapy	\$ -	\$ 85,000	\$ 97,750	\$ 105,570	\$ 110,849	\$ 116,391
Learn to Swim	\$ -	\$ 257,990	\$ 309,588	\$ 346,739	\$ 402,724	\$ 422,860
Camps and Clinics	\$ -	\$ 35,000	\$ 45,250	\$ 53,470	\$ 56,144	\$ 58,951
Team Programs	\$ -	\$ 39,000	\$ 44,850	\$ 48,438	\$ 50,860	\$ 53,403
Program Sponsorships/Contributions	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Miscellaneous	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL INCOME	\$ -	\$ 1,540,464	\$ 1,823,754	\$ 1,985,044	\$ 2,115,643	\$ 2,213,926
NET REVENUE (DEFICIT)	\$ (115,950)	\$ 384,282	\$ 579,797	\$ 666,768	\$ 734,706	\$ 766,225

Source: ISG and ConsultEcon, Inc.

Figure XIV-2
Option #2 Financial Summary
Wellesley Aquatic Facility

Wellesley Aquatic Facility						
Financial Summary						
Option #2						
EXPENSES	Year Zero	Year One	Year Two	Year Three	Year Four	Year Five
OPERATIONAL EXPENSES	\$ 105,850	\$ 1,074,698	\$ 1,134,942	\$ 1,189,961	\$ 1,241,789	\$ 1,293,195
Utilities	\$ -	\$ 251,665	\$ 265,449	\$ 275,007	\$ 292,694	\$ 291,418
Maintenance	\$ -	\$ 48,700	\$ 61,859	\$ 74,732	\$ 75,774	\$ 94,033
Equipment and Supplies	\$ 4,000	\$ 12,500	\$ 13,000	\$ 13,520	\$ 14,061	\$ 14,623
Staff	\$ 99,350	\$ 689,033	\$ 716,474	\$ 745,013	\$ 774,694	\$ 805,562
General Office	\$ 2,500	\$ 72,800	\$ 78,159	\$ 81,689	\$ 84,567	\$ 87,559
Miscellaneous	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
PROGRAM EXPENSES	\$ 10,100	\$ 191,254	\$ 224,431	\$ 248,138	\$ 274,189	\$ 287,671
Community Educational Programming	\$ -	\$ 7,550	\$ 8,495	\$ 9,075	\$ 9,466	\$ 9,877
Fitness and Therapy	\$ 500	\$ 32,350	\$ 36,940	\$ 39,755	\$ 41,655	\$ 43,651
Learn to Swim	\$ 8,000	\$ 110,876	\$ 130,197	\$ 144,284	\$ 165,096	\$ 173,030
Camps and Clinics	\$ -	\$ 15,600	\$ 20,290	\$ 24,249	\$ 25,412	\$ 26,632
Team Programs	\$ 1,600	\$ 24,878	\$ 28,510	\$ 30,774	\$ 32,560	\$ 34,481
DEBT SERVICE	\$ -					
PROPERTY TAXES	\$ -					
TOTAL EXPENSES	\$ 115,950	\$ 1,265,953	\$ 1,359,373	\$ 1,438,099	\$ 1,515,978	\$ 1,580,866
REVENUE						
FACILITY REVENUE	\$ -	\$ 1,388,702	\$ 1,649,994	\$ 1,780,376	\$ 1,855,794	\$ 1,934,604
Camps and Clinics	\$ -	\$ 11,500	\$ 11,960	\$ 12,438	\$ 12,936	\$ 13,453
Club and Training Rental	\$ -	\$ 392,168	\$ 413,029	\$ 429,778	\$ 444,555	\$ 459,868
Events	\$ -	\$ 180,359	\$ 284,349	\$ 324,239	\$ 334,437	\$ 344,972
Therapy, Rehab, Health	\$ -	\$ 25,000	\$ 26,250	\$ 27,563	\$ 28,941	\$ 30,388
Sales	\$ -	\$ 8,000	\$ 9,200	\$ 9,936	\$ 10,433	\$ 10,954
Memberships/Daily Usage	\$ -	\$ 756,675	\$ 890,206	\$ 961,422	\$ 1,009,493	\$ 1,059,968
Facility Sponsorships/Contributions	\$ -	\$ 15,000	\$ 15,000	\$ 15,000	\$ 15,000	\$ 15,000
School District or Park and Rec Usage Fees	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
PROGRAM REVENUE	\$ -	\$ 440,490	\$ 524,463	\$ 583,404	\$ 651,222	\$ 683,783
Community Educational Programming	\$ -	\$ 17,500	\$ 20,125	\$ 21,735	\$ 22,822	\$ 23,963
Fitness and Therapy	\$ -	\$ 85,000	\$ 97,750	\$ 105,570	\$ 110,849	\$ 116,391
Learn to Swim	\$ -	\$ 257,990	\$ 309,588	\$ 346,739	\$ 402,724	\$ 422,860
Camps and Clinics	\$ -	\$ 35,000	\$ 45,250	\$ 53,470	\$ 56,144	\$ 58,951
Team Programs	\$ -	\$ 45,000	\$ 51,750	\$ 55,890	\$ 58,685	\$ 61,619
Program Sponsorships/Contributions	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Miscellaneous	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL INCOME	\$ -	\$ 1,829,192	\$ 2,174,457	\$ 2,363,780	\$ 2,507,017	\$ 2,618,387
NET REVENUE (DEFICIT)	\$ (115,950)	\$ 563,240	\$ 815,083	\$ 925,682	\$ 991,039	\$ 1,037,521

Source: ISG and ConsultEcon, Inc.

CALCULATIONS AND ASSUMPTIONS

Revenue Projections

In developing the financial forecast, conservative revenue estimates were used in most major areas. Specifics on the financial calculations and forecasts for the Learn to Swim Program, membership programs, and event revenue are included in prior sections (Section IV, Section VIII, and Section IX). Sponsorship, advertising, and fundraising revenue are discussed in the Sponsorship Section later in this report. Examples of facilities and programs in the region exist with higher Learn to Swim, sponsorship, and program revenue. The revenue projections are based on in-depth analysis of market rates and participation, current program levels, wait list and demand, and programs at comparable facilities.

Cost Projections

Operational costs were calculated based on utility and staffing costs in Wellesley and operating costs at comparable facilities in the region. Projections were also validated through comparisons with regional and national facilities with similar climates and programming load. Other costs were based on best estimates from other facilities and experience. The expenses and operating costs were forecasted on the high side due to the higher cost structure in the region.

The program costs are all directly linked to participation and program revenue. Program costs decrease or increase with program revenue decreases or increases. Program costs include marketing, credit card/registration system fees, staff training and development, and other expenses relevant to each program.

A long term equipment replacement fund line item is included in the operational costs. This replacement and long term maintenance fund annual contribution is designed to accrue funds for long term anticipated major equipment replacement or repairs and avoid large maintenance or capital financial costs in the future.

No debt service costs have been included in the operational budget in order to provide the best clarity of actual operational costs and revenue.

Costs are based on several assumptions:

- Annual operating expenses such as utilities are budgeted with a 3% annual growth rate
- Maintenance and equipment replacement costs increase at a faster rate, based on anticipated ending of warranties and aging of equipment
- Operating expenses are based on state of the art technology such as Myrtha pool technology, Neptune Benson Defender filter systems, variable frequency drives, UV systems, pool covers, and best operational practices. Traditional technology would result in higher annual operational costs and higher long term maintenance costs.
- Hourly rates are based on current hourly rates for Town of Wellesley Recreation lifeguards and aquatic staff in other area aquatic facilities
- Taxes and benefits for full time employees are calculated at 30% of salary/wages
- Taxes for part-time employees are calculated including FICA and Medicare taxes at 10% of wages
- Instructor costs are calculated as between 30% and 35% of specific program revenue based on the nature of the program and student/instructor ratios. The staff cost factors are indicated in the line item comments in the budget detail.
- Online program registration, credit card, and processing fees are calculated at 3% of membership and programming revenue.
- Year Five shows lower net revenue and higher operational expenses. Best operational practices indicate the need to drain each pool approximately every five years for water replacement, cleaning, and inspection. These onetime costs are reflected in the Year Five operational expenses. Year Six will again continue the growth trend in net revenue.

Revenue Growth Assumption

- Revenue growth in each revenue area is estimated at 15% in Year Two, 8% in Year Three, and 5% in Year Four and Five unless otherwise specified in the line item comments.

The detail, assumptions, and backup calculations for each line item are included in the comment section of each line item in the budget detail.

YEAR ZERO

The success of the programming and the financial viability of the aquatic facility will depend on opening with a full schedule of programming and participation beginning on day one. The annual financials identify key management, staff, training, and marketing costs that fall in the year prior to opening (designated as Year Zero). It is critical that facility and program management is on board many months prior to opening and that marketing money and

support is budgeted in advance of opening to promote programs, membership, participation, rental use, and events. These are costs that traditionally would not be factored into the overall project construction costs but would be included in owner costs.

KEY BUDGET ITEMS AND INCLUSIONS

Every effort has been made to include all the expenses and detail that are often overlooked in developing an aquatic facility business plan and budget projections. These items included in the financial projections are based on the real life facility management experience gained from years of managing facilities. These include:

- Marketing and Mailing Costs (assumption is that most of the marketing efforts will be part of existing GEPD communication and marketing programs)
- Staff training and development
- Staff travel
- Professional dues and certifications
- Licensing Fees
- On-line registration and credit card fees
- Staff outfitting and uniforms
- IT Support
- Technology

There is also a miscellaneous/contingency budget expense line item of \$5,000 annually in operational expenses.

FINANCIAL DETAIL

The detailed five year expense and revenue projections for each Option #1 and #2 are included in report as attachments. Each projected budget has several spreadsheets supporting the details as indicated below.

Option #1:

- | | |
|-----------------------|-----------------------|
| • Operating Expenses | Attachment #9A |
| • Program Expenses | Attachment #9B |
| • Facility Revenue | Attachment #9C |
| • Program Revenue | Attachment #9D |
| • Net Program Revenue | Attachment #9E |

Option #2:

- Operating Expenses **Attachment #10A**
- Program Expenses **Attachment #10B**
- Facility Revenue **Attachment #10C**
- Program Revenue **Attachment #10D**
- Net Program Revenue **Attachment #10E**

Section XV
MANAGEMENT

The best facilities in the world are not guaranteed to be successful. There are many great facilities that are not sustainable and fail to fulfill their promise and vision. There are many average facilities that are community gems and generate operating surpluses. The critical component is the management team and operating model. It is critical that the aquatic facility has professional business oriented and entrepreneurial management with a range of aquatic program, business, event, and marketing experience. The creation of a full-time facility management position in place at least six to eight months in advance of facility opening will also be important and is included in the staffing cost projections. Additional funds for staff professional development are also included in the financial projections. Program expenses include a stipend to support a part-time Swim Lesson program director to manage learn to swim (often the head instructor). As the programs grow and evolve, money should be reinvested in further staff and management development to continue the growth of programs, community benefits, and financial sustainability.

While this report does not presume to provide a full organization chart with job descriptions, it should serve as a general management overview of the staff needed for the aquatic facility.

Instructors/Trainers

Some advance training is also budgeted in Year 0 for key program personnel. The instructors, trainers, and other employees that are specifically linked to programs appear under program expenses as 'staffing' and are linked to the participation and revenue of the programs. These are usually part-time hourly employees.

Section XVI
MARKETING

Marketing of the aquatic facility and the aquatic programs is critical to the success of the programs. Any marketing of the aquatic facility will also benefit from the overall ice/aquatic facility marketing. A small marketing budget is included both in the operating expenses for the overall aquatic facility and in program expense budgets for specific programs. The financial projections include marketing budget totals of \$4,500 in Year Zero and \$11,500 in each year of operations.

Marketing should focus on promoting facility programs, increasing participation in facility programming, growing membership programs and daily use (including the summer and masters swim teams), and bringing in facility users. The effort includes good public relations and media exposure for the facility and its programs, targeted marketing collateral pieces, program and facility websites, and other social networking media. Large bulk mailing costs can be avoided by creative use of school and community based communication networks, especially for community beneficial programs.

Section XVII
ADVERTISING AND SPONSORSHIP OPPORTUNITIES

The proposed aquatic facility and its events provide advertising and sponsorship opportunities. Although minimal sponsorship or advertising revenue is included in the revenue projections, the opportunity exists for both facility and program sponsorship and advertising. Sponsorships of specific programs and grants to support scholarship funding for those unable to afford swim lessons and other programs are another revenue option. Sponsorships may also include cost relieving donations of product and services. Option #2 with the expanded use and event calendar presents more advertising and sponsorship opportunities than Option #1.

The only sponsorship and advertising currently in the financials are for the facility. No program sponsorship or advertising is currently included in the financials. Annual sponsorship and advertising revenue included in the financial projections are as follows:

Option #1	
Sponsorship	\$ 5,000
<u>Advertising</u>	<u>\$ 5,000</u>
TOTAL	\$10,000
Percent Total of Overall Revenue	<1%

Option #2	
Sponsorship	\$ 7,500
<u>Advertising</u>	<u>\$ 7,500</u>
TOTAL	\$15,000
Percent Total of Overall Revenue	<1%

Comparable well marketed facilities can generate sponsorship, advertising, and grant support up to 3 percent to 5 percent of total gross revenue.

Section XVIII

GRANT PROGRAMS

In addition to partnerships linked to various programs, there may be grants available for specific community-based programs. Management of the aquatic facility should explore grant funding to meet community-specific program and participation needs. Area economic development and convention and visitor bureaus may provide some funding support for specific event related amenities to enhance the sports tourism economic impact. Although this would not be a factor for the Town of Wellesley, the event capabilities of Option #2 can have a significant regional economic impact. Grants may include funding for the timing system/scoreboard or some event specific competitive equipment.

There are also potential grants from utility companies for use of key energy-saving technology such as Variable Frequency Drives, Regenerative Media Filters, specific lighting, etc.

Other potential grants projects include:

- Learn to Swim programs for underprivileged or needy children
 - Support scholarships for cost of lessons
 - Provide funding for swim suits, caps and goggles
 - Provide transportation to facility for children
- School district-wide Learn to Swim/water safety program for a specific grade
- Scholarship and outreach programs to increase youth involvement in local swim teams
- Water safety/drowning prevention programs in the community or school system
- Childhood fitness programs to combat childhood obesity
- Environmentally friendly green construction and operation options
- Community outreach programs to encourage exposure of the facility and its programming
 - Swim Club ambassador and outreach programs and community service programs in the communities
- Support for transportation for seniors unable to get to the pool on their own
- Economic development grants to support event specific equipment and amenities as well as specific events