



**CITY OF ELK GROVE
CITY COUNCIL STAFF REPORT**

AGENDA TITLE: Civic Center Project Update

MEETING DATE: March 10, 2010

PREPARED BY: Jessica Shalamunec, Planning Manager

DEPARTMENT HEAD: Don Hazen, Planning Director

RECOMMENDED ACTION:

Staff recommends the City Council receive a presentation from ERA AECOM regarding the Civic Center Market and Financial Planning, Phase 1 – Market Report and Program Recommendations and provide direction on next steps for the Civic Center project.

BACKGROUND INFORMATION:

The City Council established the future location of the Elk Grove Civic Center in June 2004 as part of the approval of the Laguna Ridge Specific Plan. Located on the south side of Elk Grove Boulevard, between Big Horn Boulevard and Laguna Springs Drive, the Civic Center includes a 20.6 acre Civic Center site and an adjacent 56.1 acre Community Park, providing a total of 76.7 acres.

In March 2007, the City Council authorized the City Manager to negotiate a contract with Zaha Hadid Architects and subcontractors to undertake extensive public outreach and planning services for the Elk Grove Civic Center Master Plan. Following this authorization, an internal staff team began laying out the format and scope of work for the Zaha Hadid Architects work efforts. The scope of work was refined over the course of several months. Because state law required that a California licensed architect be the architect of record, the City Council approved a contract with Stantec Consulting Services, in association with Zaha Hadid Architects, for design study work of the Civic Center in June 2008.

In addition to the Stantec contract, the City Council also directed staff to conduct initial outreach, investigate the use of a public/private partnership as a financing option, and to prepare design studies for the future Civic Center project. These initial steps into the project process included substantial public outreach through public workshops, telephone and web-based surveys, and live polling. As a result of this process, the City identified community-desired amenities to be included at the future Civic Center.

In August 2009, the City embarked on further analysis of the proposed Civic Center amenities by releasing a Request for Proposals (RFP) to solicit a consultant to conduct economic feasibility research of the Civic Center project. The selected consultant, Economic Research Associates AECOM, began its work in October 2009 and concluded the first phase of work effort in March 2010. This report provides an overview of the first phase of results of the economic feasibility analysis. Further, it identifies the next few steps for the project to continue moving forward towards construction and eventual occupation of the City's Civic Center.

ANALYSIS:

The Elk Grove Civic Center Market and Financial Planning: Phase I Market Report and Program Recommendations document is included as Attachment 1 of this staff report. In summary, based on market and demographic data specific to Elk Grove, the program recommendations for the Civic Center from the ERA AECOM team includes:

1. Main Library – A well designed facility of 80,000 to 100,000 square feet to likely include a tech center with public access computers, civic art gallery, class rooms, a small children's theater, and some areas for concessions (i.e. coffee shop and café);
2. Community Center – A well designed facility of approximately 25,000 to 35,000 square feet to accommodate 60 to 70 percent of the local events with immediate access to outdoor space that is well landscaped and can accommodate private, outdoor events; a main ballroom/event space totaling 5,500 to 7,000 square feet to accommodate up to 350 people for a dinner/banquet; a full catering kitchen, series of classrooms; large and elegant lobby;

3. Children's Discovery Center – A facility of approximately 22,000 to 24,000 square feet, dedicating approximately ½ of this space to exhibits; the facility should have ample outdoor space;
4. Attractive Outdoor Areas – Lawn areas for outdoor and tented events, controlled garden areas to serve as extensions to indoor events, lake, water features, pedestrian bridges, islands, and gazebos; an informal amphitheater could be included if properly spaced;
5. Commercial Development Complex - Reservation of easternmost 5 acres for future development of:
 - a. A full service hotel of approximately 200 rooms
 - b. A conference center of 14,000 to 16,000 square feet
 - c. A dinner restaurant of approximately 10,000 square feet
 - d. Sufficient adjacent land area for large tents to house occasional larger scale events and exhibits;
6. Other Commercial – A pizza parlor/sports bar of approximately 4,000 square feet, located to serve the sports complex and to provide catering for birthday parties at the children's discovery center; and 6,000 square feet of concession space integrated into the library and/or community center; and
7. Sports Facilities – A large 20 to 40 acre facility to host soccer, lacrosse, football, etc tournaments; a 3 to 5 acre aquatic center and indoor gymnasium with approximately 14,000 to 15,000 square feet of courts could be absorbed into the Civic Center site.

CIVIC CENTER NEXT STEPS:

Following City Council discussion of the Market Report and Program Recommendations, the following items should be considered and addressed by the City Council:

Regarding the Civic Center Program Recommendations from the report:

1. Does the City Council support moving forward with the program as identified?
2. If not, does the City Council request that any minor alterations be made to the program changes, revisions needed?
3. Or if not, does the City Council have substantive alternative direction regarding alterations to the Civic Center program?

Regarding the discussion of city facilities at the Civic Center:

1. Does the City Council wish there to be governmental facilities included within the program assumptions identified in the ERA AECOM report? If so, further detailed space-needs analysis will be identified in the near future. An initial affirmative or negative response is sufficient at this time.

The second phase of work for which ERA AECOM has been contracted includes initial cost estimates of project construction and further analysis of construction funding possibilities. In order to proceed to this phase of work, some preliminary site planning efforts need to be conducted as a basis for cost estimating and P3 coordination. A "P3" or Public-Private Partnership is a contractual agreement between a public agency (federal, state or local) and a private sector entity. The P3 agreement provides an alternate approach to funding and could accelerate construction of the Civic Center project by engaging private partners to assist with financing, planning, design, and construction of some of the uses/features under consideration. Through this agreement, the skills and assets of each sector (public and private) are shared in delivering a service or facility for the use of the general public. In addition to sharing resources, each party shares in the risks and rewards potential in the delivery of services and/or facilities.

Regarding the initial site planning of the Civic Center project:

1. Does the City Council wish to move forward with the existing contract with Stantec and Zaha Hadid Architects for a preliminary design study of the project? A slight modification to the scope of work will be required to insure the proper end-product is provided for use by ERA AECOM. A summary of the existing scope of work is included in Attachment 2.

In initially researching the possibility of utilizing a Public/Private Partnership or P3 for the Civic Center project, some concerns such as cost of construction and design controls of the project have been expressed as a potential factor in the viability of using the P3 arrangement for the project. Staff recognizes the need to establish the City's design expectations for the project, which could be provided through the Stantec contract. However, if the City Council sees the need to alter direction relative to the initial design studies, it would be more efficient in the long term to receive that alternative

direction now. For example, an RFP for an alternative design study consultant could be released.

FISCAL IMPACT:

Staff costs associated with the current work effort are included in the Fiscal Year budget through the CFD 2003-1. A component of the budget is representative of the costs associated with the design study phase, which has not yet begun. All current work tasks for the ERA AECOM efforts are within budget. At this time, no further budget resources are required to complete the current work plan.

ATTACHMENTS:

1. Elk Grove Civic Center Market and Financial Planning: Phase I – Market Report and Program Recommendations, ERA AECOM, March 2010
2. Stantec, ZHA Scope of Work



**Project Report
Elk Grove Civic Center Market and Financial
Planning: Phase I - Market Report and
Program Recommendations**

**Prepared for
The City of Elk Grove
Elk Grove, CA**

**Submitted by
ERA AECOM
AECOM Technical Services
March 3, 2010
Project No. 18374**

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General & Limiting Conditions

Every reasonable effort has been made to ensure that the data contained in this report are accurate as of the date of this study; however, factors exist that are outside the control of Economics Research Associates, an AECOM company (ERA) and that may affect the estimates and/or projections noted herein. This study is based on estimates, assumptions and other information developed by Economics Research Associates from its independent research effort, general knowledge of the industry, and information provided by and consultations with the client and the client's representatives. No responsibility is assumed for inaccuracies in reporting by the client, the client's agent and representatives, or any other data source used in preparing or presenting this study.

This report is based on information that was current as of January, 2009 and Economics Research Associates has not undertaken any update of its research effort since such date.

Because future events and circumstances, many of which are not known as of the date of this study, may affect the estimates contained therein, no warranty or representation is made by Economics Research Associates that any of the projected values or results contained in this study will actually be achieved.

Possession of this study does not carry with it the right of publication thereof or to use the name of "Economics Research Associates" in any manner without first obtaining the prior written consent of Economics Research Associates. No abstracting, excerpting or summarization of this study may be made without first obtaining the prior written consent of Economics Research Associates. This report is not to be used in conjunction with any public or private offering of securities, debt, equity, or other similar purpose where it may be relied upon to any degree by any person other than the client, nor is any third party entitled to rely upon this report, without first obtaining the prior written consent of Economics Research Associates. This study may not be used for purposes other than that for which it is prepared or for which prior written consent has first been obtained from Economics Research Associates.

This study is qualified in its entirety by, and should be considered in light of, these limitations, conditions and considerations.

I. Introduction

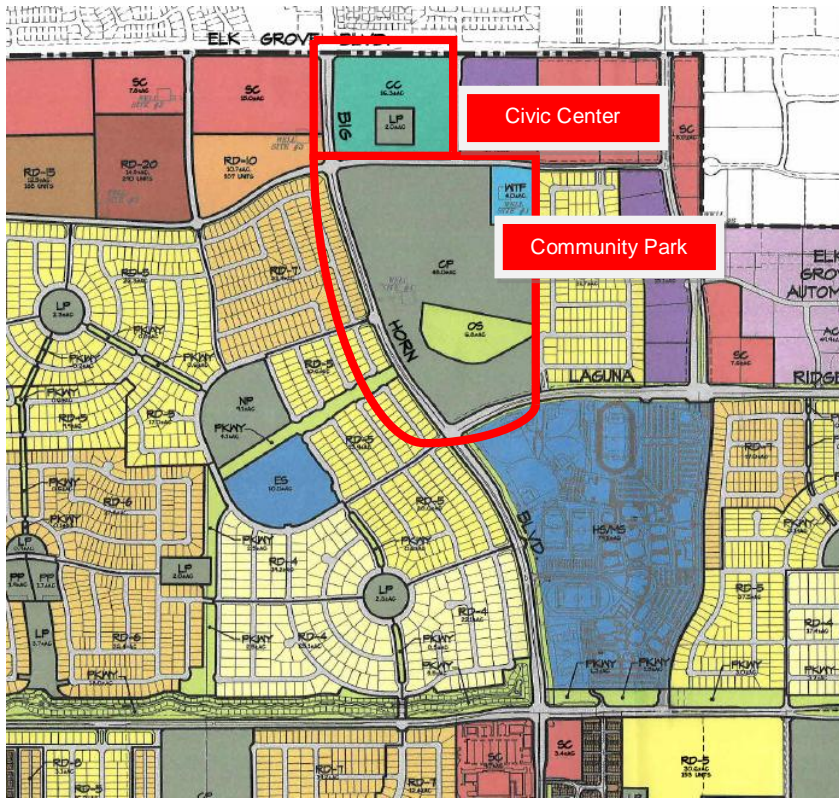
As part of the approval for the Laguna Ridge Specific Plan in June 2004, the Elk Grove City Council established a new Civic Center for the community. This Civic Center is to be constructed on a 21 acre parcel on the south side of Elk Grove Boulevard, between Big Horn Boulevard and Laguna Springs Drive (see **Figure I-1 and Figure I-2**). It would be adjacent to a 56 acre Community Park, providing a total 77-acre Civic Center and Community Park complex. Given this outstanding opportunity, the City Council has indicated the following goals for this Civic Center:

- **Reflect Community Interests** - The components of the Civic Center will be determined in part by the citizens of Elk Grove through an active and engaged public outreach process. The outreach process included public workshops and intercept, telephone and web-based community preference surveys.
- **Create a New Image for the 21st Century** - The planning and development of the Civic Center with the adjacent park provide an unparalleled opportunity to create a new city-defining image for Elk Grove.
- **Generate Economic Activity and Tax Revenue** - It is the City's desire to develop facilities, activities, and amenities that promote the Elk Grove Civic Center as a regional cultural, tourist and entertainment destination.
- **Use Municipal Fiscal Resources Efficiently** - Private capital, accessed through public/private partnerships, will be part of implementation strategy to accelerate the funding of the Civic Center construction. Earned income will be an important consideration in sustaining Civic Center operations.

Successful development of the new Elk Grove Civic Center will depend upon the integration of the aspirations of the community with market economics, memorable design and financial planning. Based upon a competitive proposal and interview process, the City of Elk Grove selected ERA AECOM, formerly Economics Research Associates (ERA), to analyze the market economics and financing strategy for this new Civic Center. In this Phase I report, ERA AECOM evaluates the facilities desired by the community and recommends a development program that will achieve the objectives mentioned above.

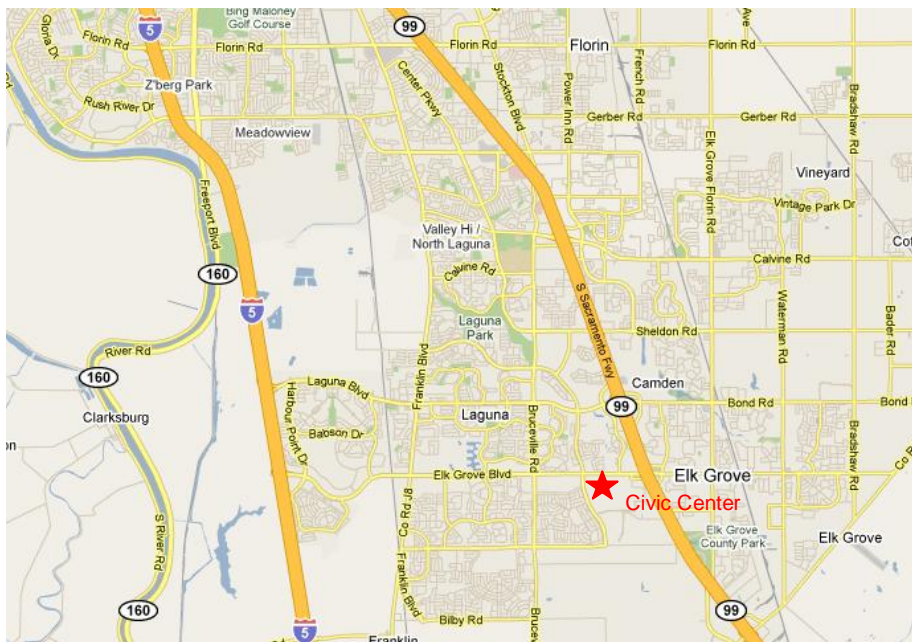
This work was led by the San Francisco office of ERA AECOM, now part of AECOM Technical Services. William "Bill" Lee served as Principal-in-Charge, and Linda Cheu served as Project Manager. Jeff Cohen led the sports facilities analysis, and Sarah Linford and Shayna Ferullo assisted with research, analysis and report preparation.

Figure I-1: Map of Civic Center and Community Park Parcels



Source: City of Elk Grove

Figure I-2: Area Map and Civic Center Site



Source: Google Maps

II. Executive Summary

The City of Elk Grove has a once in a generation opportunity to create a new Civic Center. This opportunity has been shaped by vision from the City's leadership, rapid growth of the city's population, and the strategic acquisition of 77 acres which will be centrally located to the city's population of 200,000 in 15 to 20 years. When this new Civic Center approaches completion, Elk Grove will clearly be the second largest and most important city in the Sacramento region and one of the larger new cities in California.

In preparing this market analysis, ERA AECOM started with community preferences as indicated in the results of surveys and the City's objectives as gained from discussions with key City staff. In addition to looking at population growth and demographic characteristics such as income, age profile, education and ethnic composition, the consultant team examined comparable facilities in similar cities, interviewed stakeholders and inspected competing facilities in the Sacramento region. We also built upon knowledge gained from a long-standing practice in the economics of cultural, public assembly, commercial and recreation facilities. Our conclusion and recommendations are as follows and are summarized in **Table II-1**.

High Priority Facilities for Near Term Implementation

The following facilities and improvements will establish the Civic Center location and set the tone in terms of quality of design and construction for future public and private development.

Main Library for Elk Grove

The libraries in Sacramento County are operated by the Sacramento Library System. From the perspective of this System, this new library will be a branch library. However, from the City's perspective, this will be a main library and the centerpiece of the new Civic Center. The recommended characteristics include:

- A well designed facility of 80,000 to 100,000 square feet, which will likely cost in the range of \$30 to \$50 million. With iconic design, the cost could be higher.
- This library could include a tech center with public access computers, civic art gallery, some class rooms, a small children's theater and some areas for concessions (e.g. coffee shop and café).
- It would be operated by the Sacramento Library System.

A Community Center

The ERA AECOM team is recommending two public assembly facilities for this new Civic Center complex. The first is a community center designed to accommodate 60 to 70 percent local events.

The second is a hotel and conference center complex designed to bring meeting of outsiders into Elk Grove for economic development and revenue generation. The community center is recommended to have the following characteristics:

- A facility with a gross square footage of between 25,000 and 35,000.
- An immediately accessible outdoor space that is well-landscaped and accommodating for private, outdoor events.
- A main ballroom/event space totaling between 5,500 and 7,000 square feet that is able to accommodate up to 350 people for a dinner/banquet. This main room should have floor-to-ceiling windows that offer scenic views, access to the outdoors, and an overall elegant setting for formal events such as weddings.
- A full-catering kitchen that is easily accessible to the main room.
- A series of classrooms that serve as break-out rooms for business events and teaching spaces for educational purposes.
- A large and elegant lobby

In designing the community center, it will be important to separate the main ballroom from some of the other community facilities, such as the classrooms or potential art studios. Separate entrances for the main ballroom and the other rooms are recommended. This will allow the facility to host a large private function, such as a wedding or an annual business dinner, without interference from other, smaller events. This will maximize building efficiency and earned income potential from event rentals, as large events will not preclude smaller, community events occurring simultaneously. This facility is likely to cost \$14 to \$23 million for construction and will require an operating subsidy in the range of \$300,000 to \$500,000 per year.

A Children's Discovery Center

The Sacramento regional market has few museums geared towards interactive experiences for children. The only other children's museum will open in Rancho Cordova this summer. Elk Grove has a strong family demographic that is likely to support a high quality and education oriented children's museum. We recommend a facility of 22,000 to 24,000 gross square feet with about half for exhibitions. This museum will be a fee facility that is able to earn revenue from children's birthday parties, and it should have ample outdoor space. The ongoing operating budget for a museum of this scale is estimated between \$1.9 million and \$2.6 million. The required operating gap after earned income is likely to be between \$620,000 and \$840,000.

Attractive Outdoor Areas

The quality and design of the outdoor spaces of this Civic Center are extremely important. We envision lawn areas for outdoor events or for tented events, controlled garden areas that can serve as extensions of indoor events, lake, water features, pedestrian bridges, islands, and gazebos providing a picturesque background for wedding and other events. Portions of the park area can be designed to serve as an informal amphitheater; however, the community center and the amphitheater need to be sufficiently separated as to be able accommodate a wedding and a concert simultaneously. The outdoor spaces will be one of the defining features of this new Civic Center.

A Commercial Development Complex

The civic facilities recommended above will require not only capital funds for construction but will also require ongoing operating support. However, they will also create the setting for private development and real estate values capable of offsetting much of the operating support required. The ERA AECOM team strongly recommends that the eastern most five acres of this Civic Center site be reserved for the development of a commercial complex that complements the civic facilities in terms of both function and finances. The key components of this commercial complex include:

A Hotel and Conference Center

ERA AECOM strongly recommends that the City reserve the eastern most five acres of the Civic Center site for the future development of a hotel, conference center and restaurant complex. Development interest for this complex should start to solidify by the 2012 to 2014 time frame. Our specific program recommendations include:

- A full service hotel of approximately 200 rooms.
- A conference center of 12,000 to 16,000 square feet.
- A dinner restaurant of approximately 10,000 square feet.
- Sufficient adjacent land area for large tents to house occasional larger scale events and exhibits or future hotel or conference center expansion.

This complex should be designed to be highly visible to the corner of Elk Grove Boulevard and Big Horn Boulevard but also to have views of the planned park, lake, gardens or other amenities. In addition to generating sales tax and land lease revenue, the transient occupancy tax (TOT) from this hotel is like to be \$900,000 to \$1.0 million per year. A full service hotel in Elk Grove will be distinct from any existing hotels in Elk Grove which all limited service. The conference center would be able to house business, medical, educational and community events. The restaurant, in addition to being its own destination, should have sufficient capability to cater events in the conference center and the balance of the Civic Center complex.

With one or more potential hotel development sites in the Lent Ranch Special Planning Area and likely elsewhere, the City may need to be fairly aggressive in attracting a full service hotel of the desired quality to the Civic Center complex. The attraction strategy should include some combination of the following:

- A well planned and well designed Civic Center complex that is substantially underway.
- A highly visible hotel site with views onto amenities.
- Below market land lease for the first five or ten years.
- City construction of the conference center, which would be conveyed to the hotel for integrated hotel/conference center operations in exchange for guaranteed dates for key community events. (A municipally operated conference center is likely to require annual General Fund subsidy in the range of \$500,000 per year.)

A hotel, conference center and restaurant complex would be highly compatible with a Civic Center and would enhance its overall appeal to locals and visitors. In addition, it would generate transient occupancy tax, some sales tax and relieve the City of the operating cost of a conference center.

Other Commercial

Our recommended retail program is about 20,000 square feet of space consisting of a 10,000 square foot destination restaurant with added catering capacity to be able to cater events at the Civic Center such as weddings and community banquets. Ideally this restaurant would be affiliated with a nearby conference hotel. The additional square footage would consist of a pizza parlor/sports bar of 4,000 square feet, located to serve the sports complex and to provide catering for birthday parties at the children's discovery museum, and 6,000 square feet of concession space integrated with the library, performing arts center and/or community center – coffee shop, snack bar, card shop and the like.

The land lease revenue from this five acre commercial parcel plus the transient occupancy tax and a modest amount of sales tax generated by the commercial components is likely to be in the \$1.5 million per year range. This annual revenue flow will go considerable distance to offset the annual operating support required for the community center, the children's discovery museum and the maintenance of the grounds and landscaping of the Civic Center (**Table II-2**).

Sports Facilities

With the 46-acre Bartholomew Sports Park under construction by the CSD, Elk Grove has sufficient outdoor park and recreation inventory for the near and intermediate term future to satisfy the local demand. As the population of Elk Grove is expected to increase by about 50 percent over the next 20 years, other parks will need to be added to the CSD inventory to meet local demand.

However, with all of the parks located throughout the area, there is not a facility to host high-end sports tournaments. A large 20 to 40 acre facility to host soccer, lacrosse, football, etc. tournaments at one complex would not generate a profit but could have a positive economic impact to Elk Grove in terms of support for lower price-point hotels and restaurants.

Within the near term time frame, an aquatic center and an indoor gymnasium could be justified for the Civic Center or park area based on conversations with the CSD and an analysis of the current utilization. The aquatic center would require three to five acres, and the indoor gymnasium should be planned for approximately 25,000 square feet with 14,000 to 15,000 square feet of courts. Finally, through the analysis of fitness centers, ERA AECOM does not recommend adding additional fitness center facilities to the market given the current supply.

Table II-1: Planning Parameters for Civic Center and Park Facilities

	Size Range (GSF)	Typical Building Cost per SF	Content or Exhibit Cost per Program SF	Development Cost (\$mil)	Operating Budget (\$mil)	Typical Percent Earned Income
High Priority and Near Term Implementation for Civic Center						
Main Library for Elk Grove	80,000-100,000	\$350 to \$500	\$1,000	\$30 to \$50	\$2 to \$3	Minor
Community Center	25,000 to 35,000	\$550 to \$650	NA	\$14 to \$23	\$0.8 to \$1.1	50% to 60%
Children's Discovery Center	22,000 to 24,000	\$250 to \$350	\$200 to \$300	\$8 to \$12	\$2.0 to \$2.6	60% to 70%
Landscape Gardens, Water Features, etc. This portion requires completion of the Civic Center Master Plan						
High Priority and Medium Term Implementation for Civic Center						
Conference Center	12,000 to 16,000	\$500 to \$1,000	NA	\$8 to \$12	Integrated w Hotel	Operates at Loss but Generates
Hotel	200 rooms	\$200,000 per room	\$30,000/room for FF&E	\$45 to \$50	Private Operation	100%
Restaurant	9,000 to 10,000	\$250 to \$350	Tenant Improvements	\$3 to \$4	Private Operation	100%
Other Food Service & Retail	10,000 to 11,000	NA	Integrated into Civic Bldgds	NA	Private Operations	100%
Reserve Land for Future Development						
Performing Arts Center	35,000 to 50,000	\$800 to \$1,000	NA	\$30 to \$50	\$6 to \$8	50%
Sports Facilities Suggested for Park Area						
Tournament Complex	40 acres	NA	NA	\$10 to \$25	\$2 to \$3	10% to 15%
Gymnasium	25,000	\$200 to \$350	\$1,000	\$6 to \$10	\$1 to \$1.5	10% to 15%
Aquatic Center	3 acres	\$300 to \$400	\$1,000	\$4 to \$6	\$.8 to \$2	10% to 15%

Source: ERA/AECOM

Table II-2: Preliminary General Fund Impact on Facilities Operation

	Size Range (GSF)	Likely City Gen Fund Annual Support ¹	Potential Revenue For General Fund	Comments
High Priority and Near Term Implementation for Civic Center				
Main Library for Elk Grove	80,000-100,000	NA	NA	Will be operated by the Sacramento County Library System
Community Center	25,000 to 35,000	\$300,000 to \$500,000	None	Should be well designed for weddings and banquets
Children's Discovery Center	22,000 to 24,000	\$600,000 to \$800,000	None	Should be very popular in Elk Grove
Landscape Gardens, Water Features, etc. This portion requires completion of the Civic Center Master Plan				
High Priority and Medium Term Implementation for Civic Center				
Conference Center	12,000 to 16,000	None	Part of Hotel	Should be operated by hotel
Hotel	200 rooms	Lease of Property	\$1.5 m	City to collect TOT in the \$1mil range plus land lease
Restaurant	9,000 to 10,000	Lease of Property	\$150,000	City to collect sales tax plus land lease
Other Food Service & Retail	10,000 to 11,000	Lease of Space	\$35,000	Cost of producing concession space offset by lease revenue
Reserve Land for Future Development				
Performing Arts Center	35,000 to 50,000	\$3 to \$4 m	None	Market demand not strong in the near term
Sports Facilities Suggested for Park Area				
Tournament Complex	40 acres	NA	None	
Gymnasium	25,000	\$500,000 to \$900,000	None	Could include rooms for aerobic exercise, dance, yoga, etc.
Aquatic Center	3 acres	\$500,000 to \$1.5 m	None	

Source: ERA AECOM

¹ Does not include debt financing payments; any debt financing for facility capital costs will further impact the General Fund

III. Analysis of Regional Demographics

Population and demographic trends and characteristics are important factors in analyzing the market potential and demand for facilities at the proposed Elk Grove Civic Center. In the following section, ERA analyzes historic and projected demographic and economic data for Elk Grove, surrounding communities, and Sacramento County to understand the context for the proposed development.

Population Trends and Projections

Whereas Sacramento County has seen its population grow at a moderate rate, the population of Elk Grove has grown significantly, more than doubling between 2000 and 2008 and growing at an average annual rate of 11.1 percent (**Table III-1**). At present, Elk Grove accounts for approximately 10 percent of the population in Sacramento County. Relative to the average annual growth rate of the remainder of the county between 2000 and 2008, 1.6 percent, the rate of growth of the population of Elk Grove during this time period was significant.

Population growth is expected to remain strong between 2010 and 2020 and grow at an average annual rate of 2.3 percent to reach approximately 185,000 people. However, the rate of growth will level off to an estimated 1.3 percent between 2020 and 2030, when total population will reach approximately 210,000, according to estimates from the California State Department of Finance, the City of Elk Grove, and ERA (**Table III-2**). During this period, population growth rates in Elk Grove will be higher than the balance of Sacramento County.

Population Characteristics and Demographics

The demographics and characteristics of a community's population have implications for the demand of public facilities and the utilization of new development products. ERA reviewed a number of demographic characteristics including household size, race, age, income, and education level, and this data is summarized in **Table III-3**.

Table III-1: Population Growth in Elk Grove and Surrounding Areas

Sacramento County	1990	1995	2000	2001	2002	2003	2004	2005	2006	2007	2008	Rate of Growth 00-'08
Sacramento	369,365	383,700	409,244	421,185	433,268	440,716	447,097	449,926	451,483	458,113	463,794	1.6%
Elk Grove¹	-	-	59,984	75,641	81,384	86,487	110,067	121,611	131,064	136,055	139,119	11.1%
Other County	671,854	734,900	821,003	844,763	866,844	885,922	899,580	907,990	916,254	922,119	930,360	1.6%
Total Sacramento County	1,041,219	1,118,600	1,230,247	1,265,948	1,300,112	1,326,638	1,346,677	1,357,916	1,367,737	1,380,232	1,394,154	1.6%
Elk Grove Share of County	-	-	4.9%	6.0%	6.3%	6.5%	8.2%	9.0%	9.6%	9.9%	10.0%	

¹Incorporated in 2000. Population estimates are end-year estimates

Source: Bureau of Census, City of Elk Grove, and California Dept. of Finance and ERA

Table III-2: Population Forecast for Elk Grove and Surrounding Areas (2010-2030)

	2005	2009	2010	2015	2020	2025	2030	Growth Rate		
								2005-10	2010-20	2020-30
Sacramento County	1,357,916	1,432,760	1,451,816	1,547,691	1,636,015	1,729,380	1,828,073	1.3%	1.2%	1.1%
Sacramento	449,926	468,849	473,960	500,489	529,052	559,244	591,159	1.0%	1.1%	1.1%
Elk Grove	121,611	143,002	146,935	168,280	184,433	202,136	210,874	3.9%	2.3%	1.3%
Other	760,359	820,909	830,921	878,921	922,531	968,001	1,026,041	1.8%	1.1%	1.1%
Elk Grove's Share	9.2%	10.0%	10.1%	10.9%	11.3%	11.7%	11.5%			

Source: ESRI, SACOG, City of Elk Grove, California State Department of Finance and ERA|AECOM

Table III-3: Summary of Key Population Characteristics

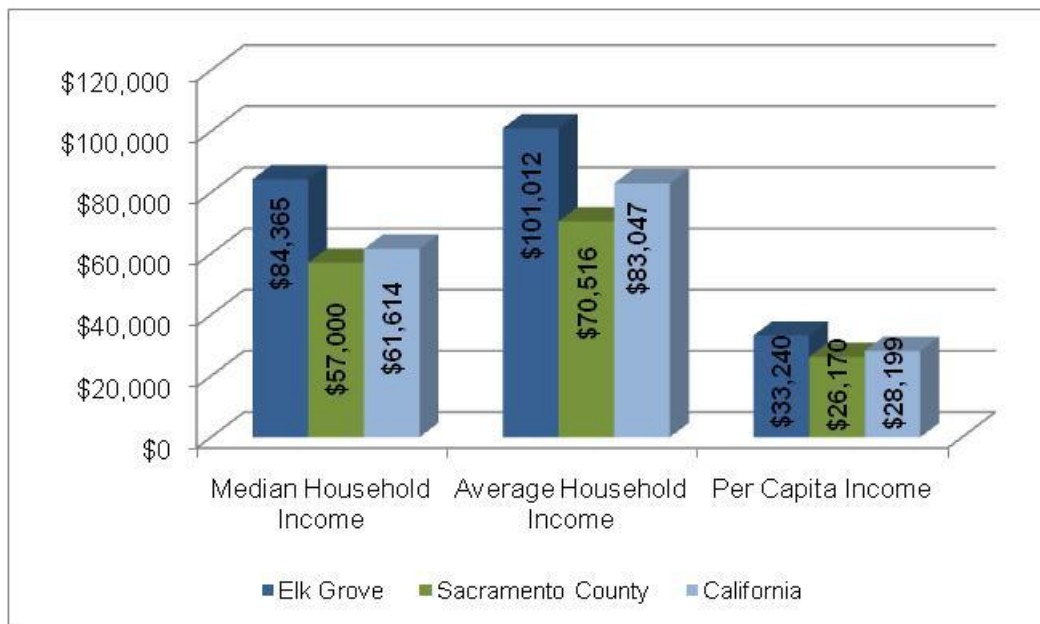
	Sacramento		
	Elk Grove	County	California
<u>2009 Household Size</u>	3.03	2.68	2.93
<u>2009 Age Distribution</u>			
0- 14	25.8%	21.6%	21.5%
15-34	24.4%	28.8%	29.4%
35-54	33.6%	28.1%	27.9%
55-74	13.4%	16.1%	15.9%
75+	2.7%	5.4%	5.3%
<u>2009 Household Income</u>			
Less than \$50,000	19.2%	43.5%	40.6%
\$50,000-\$99,999	42.3%	37.7%	33.9%
\$100,000-\$149,999	23.7%	12.0%	14.0%
Over \$150,000	14.8%	6.9%	11.5%
Median Household Income	\$84,365	\$57,000	\$61,614
Average Household Income	\$101,012	\$70,516	\$83,047
Per Capita Income	\$33,240	\$26,170	\$28,199
<u>2009 Race and Ethnicity</u>			
White	54.9%	57.9%	54.5%
Black or African American	8.6%	9.8%	6.2%
Native American	0.7%	1.0%	0.9%
Asian and Pacific Islander	18.7%	13.9%	12.5%
Other Race	7.7%	9.3%	19.8%
Two or More Races	9.4%	8.0%	6.1%
Hispanic Origin ¹	17.8%	20.0%	38.3%
<u>Educational Attainment of Population 25+</u>			
Less Than 9th Grade	3.6%	7.0%	10.5%
9th to 12th Grade, No Diploma	5.4%	8.3%	9.7%
High School Graduate	19.6%	23.2%	22.2%
Some College, No Degree	25.6%	25.0%	21.0%
Associate Degree	9.8%	8.8%	7.5%
Bachelor's Degree	25.4%	19.0%	18.7%
Graduate/Professional Degree	10.5%	8.7%	10.4%

Source: ESRI

Household Income

Relative to Sacramento County and the State of California, Elk Grove residents earn high incomes. Approximately 60 percent of households earn more than \$75,000 per year, compared to 34 percent in Sacramento County and 40 percent in the State of California respectively, and about 15 percent of all households earn more than \$150,000 per year, compared to 7 percent in Sacramento County and 12 percent in California respectively. Furthermore, the average household income in Elk Grove is over \$100,000, which is significantly higher than average household incomes in Sacramento County and in California.

Figure III-1: 2009 Income Statistics for Elk Grove, Sacramento County, and California

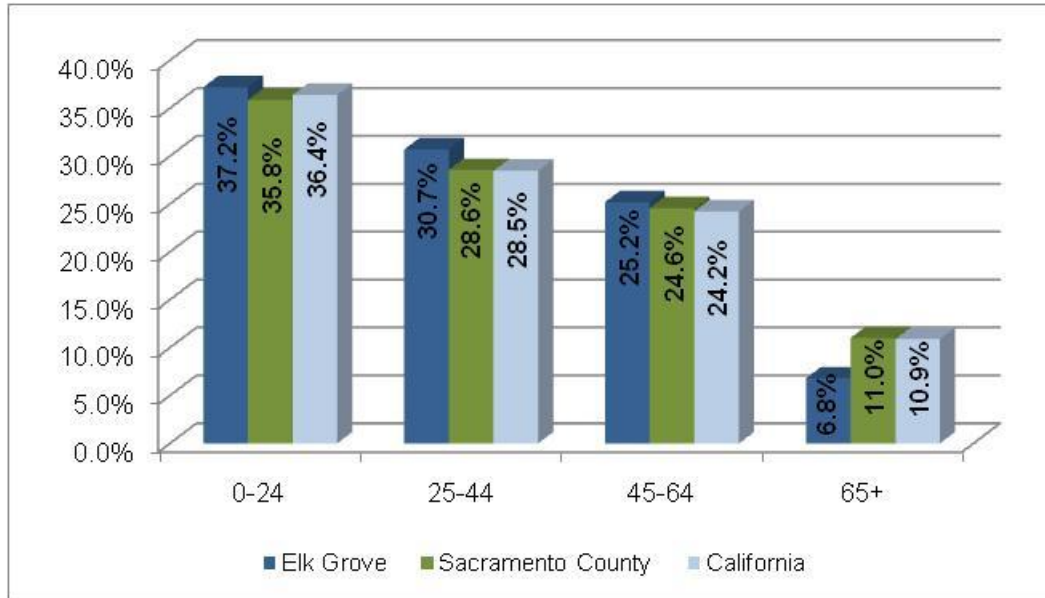


Source: ESRI

Age

Elk Grove’s population is younger, relative to Sacramento County and California, with 37 percent of its population under the age of 24, and 31 percent of its population between the ages of 25 and 44 (**Figure III-2**). Moreover, less than 7 percent of the population is over the age of 65, compared to 11 percent in both Sacramento County and California. With approximately 53 percent of the population between the ages of 25 and 65, there is a large share of residents that are of working-age, which can be beneficial for the economic growth of the local community. This data indicates that the current and future labor force is robust, which has positive implications for economic development in Elk Grove.

Figure III-2: 2009 Age Distribution of Population in Elk Grove, Sacramento County, and California

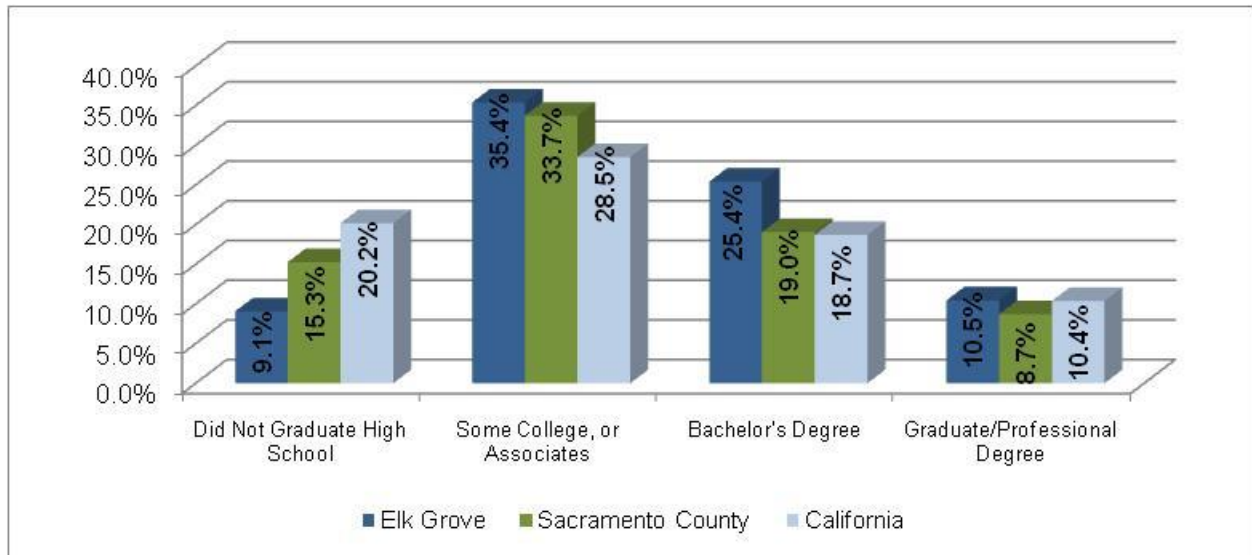


Source: ESRI

Educational Attainment

The Elk Grove population is very well educated relative to Sacramento County as a whole and California. Seventy-one percent of the population has completed some college, an Associate’s degree, a Bachelor’s degree, or a graduate degree (**Figure III-3**). This percentage is lower for the county (62 percent) and still lower for the state (58 percent).

Figure III-3: 2009 Educational Attainment in Elk Grove, Sacramento County, and California



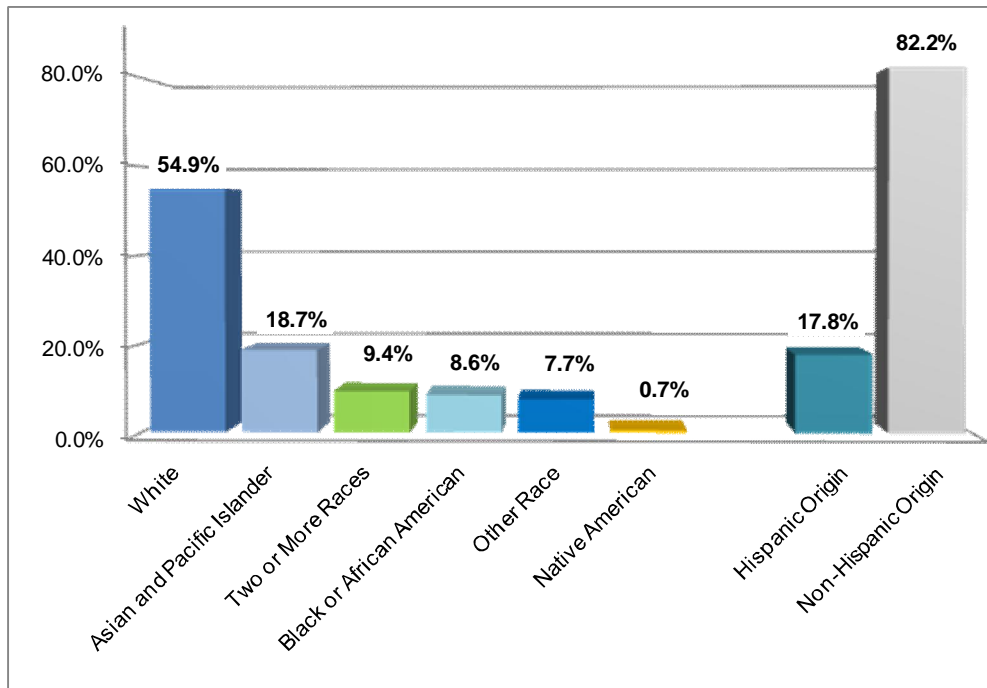
Source: ESRI

Race and Ethnicity

The ethnic composition of Elk Grove residents is relatively similar to that of Sacramento County and the State of California.¹ Over 50 percent of respondents in each of the three regions identify themselves as White, and between 13 and 19 percent of respondents identify themselves as Asian or Pacific Islanders. Elk Grove has the highest percentage of Asian and Pacific Islanders (19 percent) and a relatively high percentage of African Americans (9 percent), relative to the other two regions. It is noteworthy that over 9 percent of respondents identify themselves as one or more race and that the Hispanic population is comparatively low, at 18 percent, relative to 20 percent in Sacramento County and 38 percent in the state of California.

¹ Race and ethnicity are considered separate and distinct identities, with Hispanic origin asked as a separate question.

Figure III-4: Race and Hispanic Origin in Elk Grove in 2009



Source: ESRI

Employment Trends

ERA reviewed key employment trends in Elk Grove and Sacramento County in order to provide a context for developing a multi-use Civic Center that will be supported by the community. Key historic trends are as follows:

- Sacramento Regional employment increased significantly between 1990 and 2000, with non-farm jobs increasing from 627,300 in 1990 to 890,100 in 2000. The highest growth industry was professional and business services in both the Sacramento Region and Sacramento County. (**Table III-4** and **Table III-5**).
- From 2000 to 2008, there was a decrease in the number of manufacturing jobs and a slight decrease in the number of logging jobs, but every other sector exhibited growth in the Sacramento Region. A similar trend occurred in Sacramento County, though employment in financial services declined slightly. Notable employment growth occurred in private services, educational and health services, leisure and hospitality, and government.
- Between 2000 and 2005, there was a surge in the number of construction jobs throughout Sacramento region, due to a large number of residential and commercial projects, but these jobs have declined sharply since 2005. A similar trend occurred in Sacramento County.

- Employment in Elk Grove is mainly service-based with a relatively large percent of its workforce in public administration compared to Sacramento County and California. Both Elk Grove and Sacramento County have a much lower share of manufacturing jobs relative to the State of California (**Table III-6**).

Major Employers in Elk Grove include Sutter Health, Elk Grove Unified School District, Kaiser Permanente, Apple Computers (back-of-house operations), AAA, Methodist Hospital, and Cosumnes River College. Per conversations with the three aforementioned hospitals, all three will be undertaking major expansion projects in the next five to ten years. If these plans are realized, we estimate that medical-related employment will dramatically increase.

Table III-4: Sacramento Region Employment

TITLE	CAGR									
	1990	1995	2000	2005	2006	2007	2008	1990-00	2000-05	2005-08
Civilian Unemployment Rate	4.8%	6.7%	4.3%	4.9%	4.7%	5.3%	7.1%			
Total, All Industries	627,300	671,400	806,000	888,300	906,600	911,000	890,100	2.5%	2.0%	0.1%
Total Private	434,200	471,700	586,400	656,900	670,600	668,000	643,900	3.1%	2.3%	-0.7%
Goods Producing	81,900	73,000	101,300	117,200	114,200	108,400	95,800	2.1%	3.0%	-6.5%
Mining and Logging	700	700	900	700	700	700	700	2.5%	-4.9%	0.0%
Construction	41,900	31,000	53,100	73,400	70,700	66,900	56,100	2.4%	6.7%	-8.6%
Manufacturing	39,300	41,400	47,400	43,100	42,800	40,900	39,000	1.9%	-1.9%	-3.3%
Service Providing	536,700	589,800	695,900	763,700	784,900	794,600	786,100	2.6%	1.9%	1.0%
Private Service Producing	352,400	398,700	485,200	539,700	556,500	559,600	548,100	3.2%	2.2%	0.5%
Trade, Transportation & Utilities	113,500	116,000	138,700	148,900	153,600	153,100	146,900	2.0%	1.4%	-0.4%
Information	15,000	17,800	18,600	19,900	20,000	20,100	19,100	2.2%	1.4%	-1.4%
Financial Activities	40,500	40,700	52,300	63,500	64,600	61,800	57,500	2.6%	4.0%	-3.3%
Professional & Business Services	54,900	77,000	108,000	108,600	112,500	112,100	109,900	7.0%	0.1%	0.4%
Educational & Health Services	53,400	63,300	70,600	88,200	92,100	96,800	99,800	2.8%	4.6%	4.2%
Leisure & Hospitality	53,400	62,500	70,300	82,100	85,300	86,600	85,800	2.8%	3.2%	1.5%
Other Services	21,700	21,600	26,800	28,500	28,300	29,000	29,200	2.1%	1.2%	0.8%
Government	184,300	191,100	210,700	224,000	228,400	235,000	237,900	1.3%	1.2%	2.0%

Note: Includes El Dorado, Placer, Sacramento, and Yolo Counties

Source: California Employment Development Department

Table III-5: Sacramento County Employment

TITLE	CAGR									
	1990	1995	2000	2005	2006	2007	2008	1990-00	2000-05	2005-08
Civilian Unemployment Rate	4.6%	6.8%	4.3%	5.0%	4.8%	5.4%	599,200	1.7%	0.9%	-0.1%
Total, All Industries	471,400	482,000	558,100	600,600	614,700	615,300	599,200	1.7%	0.9%	-0.1%
Total Farm	3,900	2,900	3,200	2,700	2,700	2,900	2,900	-2.0%	-4.1%	2.4%
Total Nonfarm	465,100	479,000	554,900	598,000	612,000	612,400	596,400	1.8%	0.9%	-0.1%
Mining and Logging	300	200	300	300	200	200	100	0.0%	-7.8%	-30.7%
Construction	29,200	21,300	32,400	45,700	43,700	41,800	34,300	1.0%	6.1%	-9.1%
Manufacturing	26,300	29,000	31,500	30,900	25,000	23,900	23,000	1.8%	-1.2%	-9.4%
Trade, Transportation & Utilities	83,000	77,800	90,100	95,400	97,400	95,600	90,400	0.8%	0.9%	-1.8%
Information	12,900	14,100	14,500	15,500	15,300	15,500	14,900	1.2%	2.4%	-1.3%
Financial Activities	32,500	32,000	40,500	45,300	45,900	43,400	39,900	2.2%	1.5%	-4.1%
Professional & Business Services	45,200	56,200	76,200	73,400	82,800	81,500	80,300	5.4%	-1.8%	3.0%
Educational & Health Services	41,100	46,400	51,600	62,800	66,000	68,400	70,000	2.3%	3.1%	3.7%
Leisure & Hospitality	34,700	40,700	44,100	49,500	52,300	53,300	52,300	2.4%	1.8%	1.9%
Other Services	16,500	16,200	19,100	20,800	20,400	20,400	19,500	1.5%	2.0%	-2.1%
Government	143,400	145,100	154,700	158,400	163,100	168,400	171,700	0.8%	0.1%	2.7%

Source: California Employment Development Department

Table III-6: 2009 Employed Population 16+ by Industry

	Elk Grove	Sacramento County	California
Total	68,160	598,474	15,293,457
Agriculture/Mining	0.7%	0.6%	1.8%
Construction	6.1%	6.9%	6.5%
Manufacturing	4.3%	4.9%	9.1%
Wholesale Trade	3.2%	3.1%	3.7%
Retail Trade	10.0%	11.1%	11.0%
Transportation/Utilities	4.7%	4.3%	4.5%
Information	2.6%	2.8%	2.9%
Finance/Insurance/Real Estate	9.6%	9.1%	7.5%
Services	43.9%	45.2%	48.6%
Public Administration	14.9%	11.9%	4.5%
Total	100.0%	100.0%	100.0%

Source: ESRI

Summary of Key Findings

The following points illustrate the key findings from research on demographic trends:

- The population of Elk Grove has grown significantly since 2000, doubling by 2008. While the growth rate is expected to slow, total population is expected to exceed 200,000 by 2030.
- Compared to populations in Sacramento County and California, residents in Elk Grove are younger, more educated, and have higher household income. Elk Grove's residents are highly diverse, with a relatively large percentage of Asian and Pacific Islanders relative to Sacramento County and California.
- The region has seen a large decrease in employment in farm, manufacturing, construction, and an increase in employment within the education, healthcare, and leisure and hospitality sectors.
- Employment in Elk Grove is mainly in services with a high percentage of workers in public administration relative to Sacramento County and Elk Grove.

IV. Market Assessment for Cultural Facilities

ERA has conducted a market assessment of the following cultural uses:

- Children's Museum
- Library
- Performing Arts Center
- Arts Center
- Veteran's Memorial
- Botanical Garden/ Garden Attraction

In this section we outline the particular methodologies used for the variety of cultural uses considered and present our analysis of potential demand, key findings and recommendations. We pursued a more detailed analysis for uses that showed likely market demand from our initial interviews and research.

Children's Discovery Center

To assess the potential demand for a children's museum, ERA surveyed family entertainment centers in the Elk Grove market, reviewed regional museum statistics, and researched eleven comparable children's museums nationwide. We then estimated likely attendance for 2015, 2020, and 2030 and prepared physical planning parameters to guide future sizing and phasing. We have also outlined preliminary financial analysis for the initial capital investment and ongoing operations. These steps were conducted for planning purposes only and are not intended as a comprehensive feasibility study.

Survey of Family Entertainment Centers

ERA visited three family entertainment centers in the Elk Grove area:

- Laguna's Awesome Party Palace- opened in 2005, includes a playroom with safe play equipment for young children and birthday party facilities. Weekends are solidly booked for parties two months in advance.
- Strikes Family Entertainment Center- bowling facilities with arcade, rock wall, and lazer tag. Activities geared towards older children.
- Funcoland Inc- no longer in operation.

Based on our survey, ERA believes the Elk Grove market is underserved by children's facilities, especially those with an education focus.

Regional Museum Market

The Sacramento market has a modest selection of museums, many of which are operated by State Parks. Attendance to regional museums is generally below 100,000, with only four exceptions (see **Table IV-7**). The average exhibit square feet is nearly 22,000, translating to 5.2 persons per exhibit square foot on average. The average resident penetration rate for local museums is 2.3 percent; however, those with attendance greater than 100,000 achieve ranges over 3 percent. The average tourist market penetration is 1.9 percent.

Table IV-7: Sacramento Region Museum Characteristics

Museum	Size			Visitors to Exhibit SF	Penetration Rates	
	2007 Attendance	Gross SF	Exhibit SF		Local	Tourist
California State Capitol Museum	470,000	n/a	n/a	n/a	6.6%	9.4%
California State Railroad History Museum	301,212	100,000	72,000	4.2	4.2%	6.0%
Crocker Art Museum	169,330	50,000	42,000	4.0	3.1%	2.7%
Sutter's Fort State Historic Park	140,000	30,000	20,000	7.0	3.9%	0.9%
Aerospace Museum of California	90,000	37,500	20,200	4.5	2.0%	1.0%
Discovery Museum Science & Space Center	77,561	10,400	5,400	14.4	1.9%	0.8%
California State Military Museum	63,000	12,000	8,000	7.9	1.1%	1.0%
California Museum for History, Women and the Arts	42,018	32,500	25,000	1.7	1.1%	0.3%
Discovery Museum Gold Rush History Center	41,607	25,000	16,000	2.6	1.0%	0.4%
Discovery Museum Science & Space Center	38,000	5,000	5,000	7.6	1.1%	0.3%
Governor's Mansion State Historic Park	30,000	15,000	10,000	3.0	0.8%	0.2%
Leland Stanford Mansion State Historic Park	12,000	19,000	15,000	0.8	0.3%	0.1%
Average	123,000	31,000	22,000	5.2	2.3%	1.9%
Median	70,000	25,000	16,000	4.2	1.5%	0.9%

Source: American Association of Museums, Individual Facilities, ERA AECOM

Currently there are a number of cultural attractions and expansions planned for the Sacramento market. With major improvements, new additions, and planned reinvestment, an Elk Grove Children's Museum would be opening in a more competitive market. Upcoming projects are outlined below.

Sacramento Children's Museum

An Elk Grove Children's Museum will compete most directly with the planned Sacramento Children's Museum which is



to open summer 2010. It will be located off Highway 50 at Zinfandel Drive in Rancho Cordova.

Planned exhibits for the museum include:

- Waterways—children can experiment with the flow of water, build their own boat, create whirlpools, etc
- Raceways—traveling exhibit which demonstrates basic principles of objects in motion
- World Market—Sort fruits and vegetables, stock shelves, checkout at the cash register
- My Neighborhood—role playing and storytelling as the basis for building cultural awareness and celebrating families and traditions
- Baby Bloomers—separated from the rest of the exhibits and is specially designed for babies and toddlers to enjoy safe exploration
- Studio of the Arts—children have the opportunity to work with a variety of materials including recycled materials, clay, fabric, feathers, paint, rocks, glitter, and more
- Traveling Exhibit—rotating exhibitions

The museum will also host birthday parties for \$250 for non-members which include day access to the museum for up to 20 guests and one hour use of the party room. There is no planned café for the museum, only quick vending options.

The Sacramento Children’s Museum, a private non-profit, has been in development since 2004. It is designed to meet the needs of children 0-8 years. There are currently 12 members of the board of directors in addition to another 10 advisory members.

California Unity Center

The California Unity Center will be a highly interactive learning center that engages youth and visitors with programs and exhibits that embrace inclusion, honoring California's



diversity, and motivating people to play an active role in building unity in their communities. The planned facility includes 32,000 square feet, including 11,800 square feet dedicated to exhibitions. The Center’s opening date is undetermined.



Crocker Art Museum Expansion

The Crocker Art Museum is currently finishing an expansion that will open in October 2010. The Crocker has outgrown its current Victorian mansion and will now have an additional 125,000 square feet for events, exhibitions, and programs.

Powerhouse Science Center

Sacramento’s science museum, the Discovery Science Center is currently planning to move to the historic PG&E building on Jibboom Street in Sacramento. This more central location will include about 30,000 square feet of exhibition space, a planetarium, and a simulated archaeology dig site. The capital campaign is in its earliest phase and no date has set for opening the new facility.

Profiles of Comparable Children’s Museums

ERA reviewed the following list of children’s museums nationwide, focusing on those in California, capital regions, or in cities of similar size. Data was collected from individual institutions and from the most recent Association of Children’s Museums Directory. Short profiles on each of the institutions are included below, followed by summary tables of operational characteristics.

- A.C. Gilbert's Discovery Village, Salem, OR
- Austin Children's Museum, Austin, TX
- Bay Area Discovery Museum, Sausalito, CA
- Children's Discovery Museum of San Jose, San Jose, CA
- Children's Museum of Stockton, Stockton, CA
- Duluth Children's Museum, Duluth, MN
- Habitot Children's Museum, Berkeley, CA
- Imagine Children's Museum, Everett, WA
- Kidspace Children's Museum, Pasadena, CA
- Madison Children's Museum, Madison, WI
- The Magic House- St. Louis Children's Museum, St. Louis, MO

A.C. Gilbert's Discovery Village, Salem, OR

A.C. Gilbert’s Discovery Village is a private non-profit, community built children’s museum offering exhibitions, summer camps, birthday parties, and outreach programs since 1989. The museum is comprised of three historic houses, totaling 12,000 square feet with 3,000 square feet dedicated to exhibitions and an additional 20,000 square feet of outdoor exhibits known as A.C.’s Backyard.



Indoor exhibits include a village grocery, Recollections (a projection system that allows visitors to create images of themselves), The River Room, The Bubble Room, Body Basics, Toy Inventor’s

Workshop, the Toddler Room, Dinostories, and Imagination station (about the life of A.C. Gilbert). In the outdoor exhibition space visitors can climb the world’s largest erector set tower, play marimbas in the musical ensemble deck, explore the inside of an animal cell, or become the captain of a paddle wheeler.

Austin Children's Museum, Austin, TX

The Austin Children’s Museum has operated out of the Dell Discovery Center in downtown Austin since 1997, with grass roots efforts to provide educational programs since 1983. The museum operates approximately 10,000 exhibit square feet in a 20,000 square foot facility.



The museum offers a range of programming in addition to educational exhibitions and play areas. Programs include Storytime, Community Night, Engineering Saturday, and Science Sunday. Permanent exhibits include In My Family, Funstruction Zone, Gobar City and Tinkerer’s Workshop. The museum also rents the facility for children’s birthday parties (ranging from \$175 to \$400 per event), sleepovers, as well as special events.

Bay Area Discovery Museum, Sausalito, CA

The Bay Area Discovery Museum is an indoor/outdoor children’s museum at the foot of the Golden Gate Bridge and the only children’s museum located in a national park. It services children ages 6 months to 8 years with a variety of permanent and rotating exhibitions, programs, performances, activities, and festivals. The museum includes 10,000 exhibit square feet located in the 51,000 square foot facility. The additional outdoor area is 2.5 acres.



The current special exhibition is Animal Secrets about the hidden habits and secret lives of forest animals. The Discovery Theater (180 seats) offers a range of family programs including puppets, dance, storytelling, circus acts, etc. Permanent exhibits, both indoor and outdoor, include the lookout cove featuring the built icons of the Bay Area, Art Studies, Tot Spot, Bay Hall (interactive simulation of Bay Area ports), and

Wave Workshop. The museum hosts birthday parties (\$200-\$950) as well as operates a café and store.

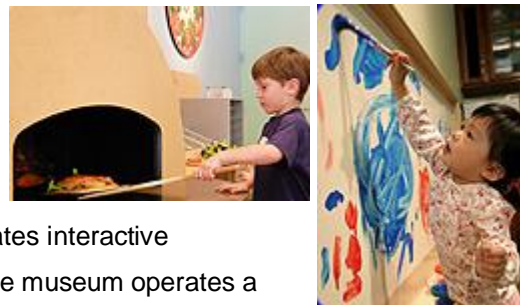
Children's Discovery Museum of San Jose, San Jose, CA

The Children's Discovery Museum of San Jose opened in 1990 in the current 52,000 square foot purple building designed by Mexico City-based architect Ricardo Legoretta. There are approximately 27,000 square feet dedicated to exhibitions. The museum is surrounded by the Guadalupe River Park.

Exhibit galleries offer multi-sensory, layered experiences for children of varying developmental stages, interests and backgrounds. Exhibits include the Art Gallery, Art Loft, Bubbalogna,



Cornhusk Dolls, Current Connections, the Kids' Garden, Rainbow Pizza and Market, Secrets of Circles, Streets, Waterways, and the Wonder Cabinet. The museum also programs an indoor theater as well as an amphitheater. In addition to



internal exhibitions, the development team also creates interactive exhibitions that can travel to other organizations. The museum operates a gift store, includes a café, rents the facility for special functions, and hosts birthday parties (\$200-\$450).

Children's Museum of Stockton, Stockton, CA

The Children's Museum of Stockton is located near the downtown waterfront with 24,000 gross square feet of building space. The museum features hands-on, play based exhibits in a



dozen different child-sized environments (merchants, bankers, doctors, grocery shoppers). Each station has a tool or task for children to perform.

The museum hosts birthday parties (\$205 to \$235) and accommodates field trips for elementary schools in the area. The museum will accommodate up to 150 students at one time.

Duluth Children's Museum, Duluth, MN

The Duluth Children's Museum, which has been located in a shared space in Duluth's Depot with 7,500 square feet, has recently purchased the former Duluth Brewing & Malting building next to the Duluth Heritage Sports Center along Interstate 35.

The new museum, a total 28,000 square feet, would add 30 feet to an existing second floor balcony to create a science learning center and other usable exhibition space. Designs for the new building include six major exhibit halls, a gift shop, teaching kitchen and a small theater. A green roof will become a teaching tool. Along with the \$725,000 acquisition, the museum plans to raise \$6 million to build the museum's new interior, half of which they hope to match with State bonds. Thus far, the museum has raised some funds, but financed the new building with a bank loan (75 percent) and a mortgage from the developer (25 percent).



Habitot Children's Museum, Berkeley, CA



Habitot opened in 1992 after six years of public outreach and fundraising. It is located in downtown Berkley, in a rented basement space with 7,000 gross square feet of which 3,000 square feet is dedicated to exhibitions that the museum has outgrown. The Habitot board of directors is currently in a capital campaign to raise \$5 to \$7 million for a standalone facility in the next 3 to 5 years. Habitot is focused on early childhood learning and exploration, parenting education, and community outreach for underserved populations.

Habitot features around six small-scaled theme exhibits designed especially for infants, toddlers, and young children: Firehouse, Waterworks, Drop-in Art Studio, Little Town Grocery & Café, Infant-Toddler Garden, and Wiggle Wall. The museum hosts a range of family events and activities including Confetti Art Days, Let it Snow, and Parents' Night Out. Classes at the facility are for young children 2 to 4 years and caregivers/parents. Seasonal Camps are for children 2 to 5 years. Fees to rent the party room or the entire facility for a larger children's party range from \$160 to \$475.

Imagine Children's Museum, Everett, WA

The Imagine Children's Museum in downtown Everett features 23,000 exhibit square feet in the facility's total 45,000 square feet. Child-size exhibits are interactive settings with a variety of themes: Downtown, Café, Ferry, Bank, Bus, Theater, Train, Mountain, Tree house, Clinic, Farm, Construction Site, Art Studio, Plan, and Firehouse. Activities at the museum range from classes for children, workshops on parenting for caregivers, Day camps, and home schooling support.

The museum rents classrooms at the facility for meetings and hosts birthday parties (\$145-\$295). The museum operates a store featuring a unique selection of educational books and toys.



Kidspace Children's Museum, Pasadena, CA

Kidspace Children's Museum is southern California's largest and most comprehensive facility, having been in operation since 1980. It is located in the historic Fannie Morrison Horticultural Center buildings at Brookside Park in the Arroyo Seco. This facility, which opened in 2004, features innovative exhibitory and 105,000 square feet of outdoor learning area. Gross square footage of the museum is approximately 15,000.



Indoor exhibitions at the museum are geared towards children ages 1 through 9. Visitors enter Kidspace through the Kaleidoscope and can choose from the Early Childhood Learning Center for children 4 and under and their parents, the Digging Deeper Gallery about bugs, fossils, mountains, and earthquakes in the natural world, and The Climbing Towers. Outdoor experiences include the

Gardens, Trike Tracks, an outdoor learning center for children under 4 years, Outdoor Climbers, Waterplay, and the Stone Hollow Amphitheater. Programs at the facility are organized in four categories: School and Community, Early Childhood Learning, Outdoor/Environmental Education, as well as Visual and Performing Arts. Events at the facility include daily activities and programs as well as outside birthday rentals (\$400-\$750 depending on location and weekday). The museum features a café, Nestle Café by Wolfgang Puck Catering and operates the Busy Bee Learning Store.

Madison Children's Museum, Madison, WI

The Madison Children’s Museum, which was first built in 1991, will open a new facility in August 2010, which will triple the museum’s ability to serve children and their families with a \$10 million capital campaign aimed at renovating the acquired \$5 million building, creating an accessible roof garden, and new exhibits. The former facility on State Street is currently closed, while the new location on the Capitol Square is finished.

While closed the museum has focused on community outreach, organizing off-site programs including: Mobile Exhibits and Programs, Dig into Dinosaurs, World of Homes, Let’s Grow.



The Magic House- St. Louis Children's Museum, St. Louis, MO

The Magic House has been open since 1979, and completed the most recent expansion in 2008, doubling the size of the museum with the Star-Spangled Center, Kids’ Construction Zone, Jack and the Beanstalk Climber, the Poet Tree, Can You Solve the Mystery, the Once Upon a Time Gallery and an expansive Education Center that houses three new classrooms and a large welcome area to accommodate large groups of students. The museum also includes a Backyard Magic, an outdoor garden with an open air pavilion, Children’s Sculpture Garden and Exhibit Patio added in 2001. Before expanding last year, the museum included 25,000 gross square feet and 20,000 square feet of exhibition space. Now, gross square footage of the facility totals 50,000.

Exhibits at the facility include A Little Bit of Magic, Children’s Village, For Baby & Me, Electrostatic Generator, Math Path, Expericenter, First Impressions, Lewis and Clark Adventure, Fitness Center, Observation Station, Air Power, and WaterWorks.

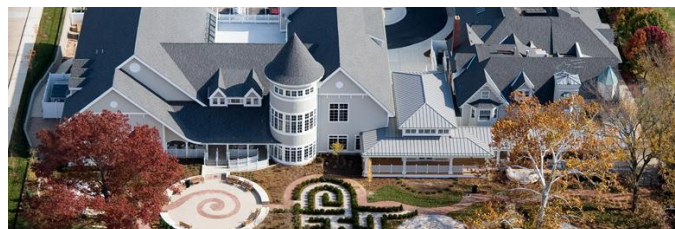


Table IV-8: Attendance Characteristics for Comparable Museums

Museum	Location	Attendance ¹	School Group % School				
			Attendance	Groups	Adult	Child	Senior
The Magic House- St. Louis Children's Museum	St. Louis, MO	383,612	106,780	28%	\$8.50	\$8.50	\$8.50
Children's Discovery Museum of San Jose	San Jose, CA	312,057	44,420	14%	\$8.00	\$8.00	\$7.00
Bay Area Discovery Museum	Sausalito, CA	279,052	10,505	4%	\$10.00	\$8.00	\$8.00
Kidspace Children's Museum	Pasadena, CA	212,714	52,031	24%	\$8.00	\$8.00	\$8.00
Austin Children's Museum	Austin, TX	185,717	17,456	9%	\$6.50	\$6.50	\$6.50
Imagine Children's Museum	Everett, WA	176,062	18,769	11%	\$7.00	\$7.00	\$7.00
Madison Children's Museum	Madison, WI	81,055	5,408	7%	n/a ²	n/a	n/a
A.C. Gilbert's Discovery Village	Salem, OR	80,577	12,727	16%	\$6.00	\$6.00	\$4.50
Habitot Children's Museum	Berkeley, CA	79,239	1,663	2%	\$8.50	\$8.50	\$7.65
Children's Museum of Stockton	Stockton, CA	60,000	25,000	42%	\$4.50	\$4.50	\$4.50
Duluth Children's Museum	Duluth, MN	39,486	4,500	11%	\$12.00	\$6.00	\$12.00
Average		171,779	27,205	15%	\$7.90	\$7.10	\$7.37
Median		176,062	17,456	11%	\$8.00	\$7.50	\$7.33

Source: Association of Children's Museums Directory, ERA AECOM

1/ On-site attendance (including school groups) only

2/Closed for relocation as of January 2010, new prices unpublished

Table IV-9: Size Characteristics for Comparable Museums

Museum	Location	Attendance ¹	Gross SF	Exhibit SF	Outdoor SF	% Exhibit	Visitors per ESF
Kidspace Children's Museum	Pasadena, CA	212,714	15,122	n/a	105,000	n/a	n/a
Children's Museum of Stockton	Stockton, CA	60,000	24,000	n/a	n/a	n/a	n/a
Children's Discovery Museum of San Jose	San Jose, CA	312,057	52,000	27,000	n/a	52%	11.6
Imagine Children's Museum	Everett, WA	176,062	45,000	23,000	9,000	51%	7.7
The Magic House- St. Louis Children's Museum	St. Louis, MO	383,612	25,000	20,000	n/a	80%	19.2
Bay Area Discovery Museum	Sausalito, CA	279,052	51,240	10,105	2.5 acres	20%	27.6
Austin Children's Museum	Austin, TX	185,717	19,920	9,925	n/a	50%	18.7
Duluth Children's Museum	Duluth, MN	39,486	7,500	5,000	n/a	67%	7.9
Madison Children's Museum	Madison, WI	81,055	12,223	4,645	n/a	38%	17.4
A.C. Gilbert's Discovery Village	Salem, OR	80,577	12,183	3,464	20,000	28%	23.3
Habitot Children's Museum	Berkeley, CA	79,239	7,000	3,000	n/a	43%	26.4
Average		171,779	24,653	11,793	44,667	48%	17.7
Median		176,062	19,920	9,925	20,000	50%	18.7

Source: Association of Children's Museums Directory, ERA AECOM

1/ On-site attendance (including school groups) only

Table IV-10: Penetration Rates for Comparable Museums

Museum	Location	Attendance ¹	% Resident Attendance	Resident Market Penetration
Duluth Children's Museum	Duluth, MN	39,486	75%	16.1%
Madison Children's Museum	Madison, WI	81,055	85%	11.6%
A.C. Gilbert's Discovery Village	Salem, OR	80,577	95%	11.3%
Austin Children's Museum	Austin, TX	185,717	85%	10.1%
Children's Discovery Museum of San Jose	San Jose, CA	312,057	85%	8.1%
The Magic House- St. Louis Children's Museum	St. Louis, MO	383,612	50%	8.1%
Bay Area Discovery Museum	Sausalito, CA	279,052	90%	7.0%
Children's Museum of Stockton	Stockton, CA	60,000	85%	4.0%
Kidspace Children's Museum	Pasadena, CA	212,714	85%	1.6%
Habitot Children's Museum	Berkeley, CA	79,239	85%	1.6%
Imagine Children's Museum	Everett, WA	176,062	15%	1.4%
Average		171,779	75.9%	7.4%
Median		176,062	85.0%	8.1%

Source: Association of Children's Museums Directory, ERA AECOM

¹/ On-site attendance (including school groups) only

Table IV-11: Operating Characteristics for Comparable Museums

Museum	Location	Attendance ¹	Gross SF	Operating Budget	Operating Budget per GSF	Earned Income	% Earned Income
Children's Discovery Museum of San Jose	San Jose, CA	312,057	52,000	\$5,704,000	\$110	\$2,505,000	44%
Kidspace Children's Museum	Pasadena, CA	212,714	15,122	\$1,894,000	\$125	\$1,894,000	100%
Children's Museum of Stockton	Stockton, CA	60,000	24,000	\$446,000	\$19	\$268,000	60%
Bay Area Discovery Museum	Sausalito, CA	279,052	51,240	\$4,101,000	\$80	\$2,140,000	52%
Habitot Children's Museum	Berkeley, CA	79,239	7,000	\$853,000	\$122	\$367,000	43%
A.C. Gilbert's Discovery Village	Salem, OR	80,577	12,183	\$600,000	\$49	\$482,000	80%
Imagine Children's Museum	Everett, WA	176,062	45,000	\$812,000	\$18	\$893,000	110%
Duluth Children's Museum	Duluth, MN	39,486	7,500	n/a	n/a	n/a	n/a
Madison Children's Museum	Madison, WI	81,055	12,223	\$1,895,000	\$155	\$1,179,000	62%
Austin Children's Museum	Austin, TX	185,717	19,920	\$2,050,000	\$103	\$1,232,000	60%
The Magic House- St. Louis Children's Museum	St. Louis, MO	383,612	25,000	\$2,704,000	\$108	\$2,354,000	87%
Average		171,779	24,653	2,105,900	\$89	1,331,400	70%
Median		176,062	19,920	1,894,500	\$106	1,205,500	61%

Source: Association of Children's Museums Directory, ERA AECOM

1/ On-site attendance (including school groups) only

Attendance Analysis

Elk Grove has a strong family demographic that is likely to support educational and interactive attractions for children. There are a limited number of children-oriented museums in the area, especially those that are experience-based learning centers geared towards families with young children. Based on these favorable indicators, ERA has assessed the attendance potential of a Children's Discovery Center. The attendance potential of the proposed Children's Discovery Center is a function of numerous factors including:

- Resident and tourist market size and characteristics;
- Quality, scale, and content of the attraction;
- Site location;
- Competitive environment;
- Level of investment; and
- Other factors such as pricing, market spending power, market acceptance / behavioral characteristics, etc.

Market factors define the basis from which attendance potential is derived, while the scope of the attraction determines the drawing power or market penetration of the attraction. The scope and drawing power of a museum or other cultural facility is a function of numerous endogenous factors such as level of initial investment, capital reinvestment, programming, image and brand identity, as well as exogenous variables such as the competitive environment. Estimates of attendance at the proposed Children's Discovery Center are preliminary and based on the known market availability factors.

Market penetration measures the propensity of available market segments to visit an attraction and is generally defined as the ratio of attendees from a market to total market size. Market penetration rates were applied to the total population of each of the available market segments to estimate the preliminary attendance potential.

Visitation to a children's museum is largely from the resident market and two resident markets have been identified: the primary, which is 0-15 miles from the project site, and the secondary which is 15-30 miles from the site. Household population for the combined available markets is 2.4 million in 2015, growing to nearly 2.9 million by 2030.

ERA assumes the following characteristics and features will be embodied in the proposed Children's Discovery Center. Please note that alterations to these factors may materially affect the facility's ability to attain attendance within the projected range.

- Interactive and engaging exhibitions targeted at children from 0-10 years of age

- Outdoor play area included in visitor experience
- The museum will reinvest in its facility and exhibits.
- The Elk Grove Children’s Discovery Center, through concept execution and marketing, will clearly differentiate itself from the opening Sacramento Children’s Museum in order to attract a new visitor base.
- A reasonable price structure will be set.
- The proposed museum will be managed by professionals competent in museum administration and management and will be staffed by persons with experience in museum operations.
- The facility will maintain an aggressive marketing and promotion program.

ERA’s projected market capture rates and attendance levels for 2015, 2020, and 2030 are shown below in Table IV- 12 through Table IV-14.

Table IV- 12: Attendance Potential for Children's Discovery Center, 2015

Market Segment	2015	Penetration Rate			Attendance		
		Low	Mid	High	Low	Mid	High
Resident Market¹							
Primary market (0-15 miles)	941,129	5.0%	6.0%	7.0%	47,000	56,000	66,000
Secondary market (15-30 miles)	1,475,756	5.0%	6.0%	7.0%	74,000	89,000	103,000
Grand Total	2,416,885	5.0%	6.0%	7.0%	121,000	145,000	169,000

Source: ESRI, ERA AECOM

1/ Household population

Table IV-15: Attendance Potential for Children's Discovery Center, 2020

Market Segment	2020	Penetration Rate			Attendance		
		Low	Mid	High	Low	Mid	High
Resident Market¹							
Primary market (0-15 miles)	998,968	5.0%	6.0%	7.0%	50,000	60,000	70,000
Secondary market (15-30 miles)	1,566,452	5.0%	6.0%	7.0%	78,000	94,000	110,000
Grand Total	2,565,420	5.0%	6.0%	7.0%	128,000	154,000	180,000

Source: ESRI, ERA AECOM

1/ Household population

Table IV-14: Attendance Potential for Children's Discovery Center, 2030

Market Segment	2030	Penetration Rate			Attendance		
		Low	Mid	High	Low	Mid	High
Resident Market¹							
Primary market (0-15 miles)	1,107,865	5.0%	6.0%	7.0%	55,000	66,000	78,000
Secondary market (15-30 miles)	1,737,211	5.0%	6.0%	7.0%	87,000	104,000	122,000
Grand Total	2,845,077	5.0%	6.0%	7.0%	142,000	170,000	200,000

Source: ESRI, ERA AECOM
 1/ Household population

Physical Planning Parameters

In planning for the physical size requirements for a cultural facility such as the Children's Discovery Center, there are two important factors to consider. The first, which is based on the concept of critical mass, is the amount of exhibit space that is needed to actually achieve the potential penetration rates and attendance. There is a certain amount of content required to capture the attention of local residents and ensure that they have a visitor experience that is interesting and fulfilling enough to encourage them to visit again. The second factor is related to capacity, and is the amount of space required for visitors to flow comfortably through the facility. If visitors are too crowded or have to wait in lines that are too long (other than in initial years), the negative experience will discourage repeat visitation and the facility will have to deal with significant operational issues.

Critical Mass Approach

The key operating ratio to determine the exhibit space required to create enough critical mass to attract visitors is the ratio of visitors to exhibit square feet. Based upon comparable facilities and our own professional judgment, ERA estimated the amount of exhibit square footage required for the Children's Discovery Center, shown below in Table IV-17.

Table IV-17: Calculation of Required Exhibit Area using Critical Mass Approach

Attendees per Exhibit Sq. Ft. Analysis	2015	2020	2030
Estimated Mid-Scenario Annual Attendance	145,000	154,000	170,000
Ratio of Visitors to Exhibit Square Feet	16.0	16.0	16.0
Resulting Exhibit Square Feet	9,000	10,000	11,000
Resulting Gross Square Feet	18,000	20,000	22,000

Source: ERA AECOM

Capacity Approach

In planning for the capacity requirements of any cultural attraction, the “design day” or average high attendance day is also used as a key determinant of capacity requirements needed to adequately handle expected crowd levels. For all types of visitor attractions, it is neither necessary nor economically desirable to size facilities for absolute peak periods of on-site patronage, as some degree of crowding on special holidays or other major attendance times will be accepted by the visiting public. However, the facility must be designed to comfortably accommodate peak crowd loads on a normal high day of attendance, or lasting negative effects on visitation performance will result.

Table IV-18: Projected Design Day Attendance and Required Exhibit Area

Peak In-Museum Analysis for Stabilized Year	2015	2020	2030
Estimated Mid-Scenario Annual Attendance	145,000	154,000	170,000
Peak Month Attendance (@ 15% of total)	21,750	23,100	25,500
Weekly Attendance in Peak Month (@ 22.5% of peak month)	4,894	5,198	5,738
Design Day Attendance (@ 20% of week)	979	1,040	1,148
Peak In-Museum Attendance (35% of design day)	343	364	402
Exhibit Sq. Ft. per Person	30	30	30
Minimum Exhibit Square Footage Required	10,300	10,900	12,000
Gross Square Footage Required	20,600	21,800	24,000

Source: ERA AECOM

Preliminary Financial Analysis and Required Capital Investment

This section presents a preliminary financial analysis for a potential Children’s Discovery Center, estimating earned income and operating expenses to identify the amount of contributed income that will need to be raised on an annual basis. A range of capital investment has also been identified.

The purpose of this analysis is for long term planning. It is not meant to be used for detailed organizational accounting purposes and should serve as a guide based upon our preliminary demand analysis. Estimates have been based on industry benchmarks and are show in 2009 dollars.

Based on a total facility size of 24,000 square feet which includes 12,000 of exhibit square footage, we estimate the total operating budget between \$1.9 and \$2.6 million.

Museums and cultural institutions typically receive two types of revenue: earned revenues and contributed income. Earned income includes revenue that is generated in exchange for a service,

product, or privilege, and typically includes items such as admission fees, retail sales, food and beverage sales, program and workshop income, and facility rentals. Contributed income typically includes sources such as individual donations, grants, public / government funding, and annual fundraisers. Membership revenue is typically categorized as contributed income, although this varies by institution.

We anticipate earned income to account for two-thirds of the total operating budget, ranging from \$1.3 to \$1.8 million annually. The resulting funding gap, to be covered by contributed income sources is between \$620,000 and \$840,000.

We estimate the required capital investment between \$8 and \$12 million, based on shell costs for the total building ranging from \$250 to \$350 per square foot and additional exhibit costs between \$200 and \$300 per exhibit square foot.

Table IV-19: Preliminary Financial Analysis for Children’s Discovery Center

	Low	Mid	High
Exhibit Square Footage	12,000	12,000	12,000
Gross Square Footage	24,000	24,000	24,000
Estimated Operating Budget	\$1,920,000	\$2,400,000	\$2,640,000
Estimated Earned Income	\$1,300,000	\$1,600,000	\$1,800,000
Required Funding Gap	\$620,000	\$800,000	\$840,000
Total Capital Investment	\$8,000,000	\$10,000,000	\$12,000,000

Source: ERA AECOM

Key Findings and Recommendations

- The Sacramento market has few museums geared towards interactive experiences for children. The only other children’s museum will open in Rancho Cordova this summer.
- Elk Grove has a strong family demographic that is apt to support a children’s museum.
- Based on the experience of comparables nationwide and the size of the Elk Grove market, ERA has projected attendance for the Children’s Discovery Center in 2015 between 121,000 and 169,000 growing to 142,000 to 200,000 by 2030.
- Based on this attendance, the necessary square footage is 22,000 gross, with 12,000 for exhibitions.
- The ongoing operating budget for a museum of this is scale is estimated between \$1.9 million and \$2.6 million. The required operating gap after earned income is between \$620,000 and \$840,000

- The total capital investment is estimated between \$8 million and \$12 million.

Library

To assess the potential demand for a new library at the planned civic center, ERA interviewed key Sacramento Public Library facilities staff, reviewed operating performance data for all Sacramento libraries, and identified key comparables. Sizing recommendations were based on these findings, with consideration to national trends. Persons contacted are as follows:

- Donald Tucker, Director of Facilities, Sacramento Public Library
- Jonathan Barber, Management Analyst, Sacramento Public Library
- Rivkah Sass, Library Director, Sacramento Public Library

Sacramento Public Libraries System Interviews

ERA contacted key Sacramento Public Libraries facilities and programming staff who were able to comment on typical library performance, operating agreements, and trends. Key findings are as follows:

- Sacramento Public Libraries administration does not own land for library development. Typically land is owned by Sacramento County, cities, school districts, or privately and leased to the library.
- Sacramento Public Libraries does not provide the funding to build new facilities or expand existing libraries. After the libraries are built, a joint operating agreement is generally reached to manage ongoing operations. Operating costs for existing libraries are paid with county funds with supplemental city funding. Non-profit friends groups also support the libraries.
- Typically, construction costs for Sacramento Public Libraries are range from \$375 to \$500 per square foot. Amenities and book costs are \$1,000 per square foot. Generally the larger the facility the lower the building costs as a result of economies of scale.
- Operating costs for a 15,000-20,000 square foot library are around \$600,000 per annum.
- Sacramento's branch libraries are focused on community needs including community rooms, public access computers, wifi, reading space, children's space, performance venues, interactive and collaborative facilities.
- Demand for libraries is estimated by circulation and program attendance, which is very high in Elk Grove. Elk Grove has also been at the forefront of library development, investing in materials handling systems.
- Mixed-use libraries are a new industry trend and can be like anchor tenants in retail developments.

- There are synergies associated with libraries and entertainment complexes and performance venues. Co-location is positive.

Sacramento Public Libraries Operating Performance

Library Key Characteristics

The Sacramento Public Library system oversees the operations of libraries that were built between 1910 and 2010. Libraries range widely in size, but all, except for Carmichael, are less than 21,000 square feet. The total operating budgets for these facilities is generally less than \$1 million. Only Carmichael and Elk Grove are more at \$3 million and \$1.1 respectively. On a per square foot basis, operating expenses range from \$21 to \$166 per square foot, averaging \$77 per square foot. Details are illustrated in **Table IV-20**.

Table IV-20: Key Characteristics of Sacramento Public Libraries

Library Branch	Year Opened	Square Feet	Total Operating Budget	Operating Budget per SF
Carmichael	1964	145,000	\$3,096,800	\$21
Belle Cooleedge	1991	20,690	\$982,300	\$47
Valley Hi - N. Laguna	2009	20,300	\$724,000	\$36
Franklin	2002	19,621	\$728,000	\$37
Martin Luther King	1970	15,078	\$814,900	\$54
Elk Grove	2008	13,785	\$1,104,600	\$80
South Natomas	2001	13,615	\$627,200	\$46
North Highlands-Antelope	2000	12,890	\$863,100	\$67
Arcade	1976	12,686	\$838,000	\$66
Rancho Cordova	1975	12,500	\$905,700	\$72
Sylvan Oaks	1975	12,500	\$914,100	\$73
Central	1918	12,211	\$711,500	\$58
Colonial Heights	1989	12,000	\$920,900	\$77
Fair Oaks	1976	12,000	\$858,300	\$72
Southgate	1976	12,000	\$817,700	\$68
Arden-Dimick	1970	11,901	\$885,100	\$74
Del Paso Heights	1972	5,425	\$445,200	\$82
McKinley	1936	4,681	\$382,200	\$82
Orangevale	2001	4,500	\$329,900	\$73
Galt	1993	4,225	\$268,900	\$64
North Sacramento	1987	4,000	\$377,100	\$94
Rio Linda	1966	4,000	\$304,000	\$76
Walnut Grove	1970	3,580	\$186,300	\$52
McClatchy	1910	2,557	\$270,900	\$106
North Natomas	2004	2,500	\$414,400	\$166
Courtland	2003	2,205	\$139,000	\$63
Isleton	1993	1,700	\$129,400	\$76
Average		14,746	\$705,167	\$70
Median		12,000	\$724,000	\$72

Source: Sacramento Public Libraries, AECOM

Library Customers

On average, the number of total customers has increased by 30 percent for Sacramento Libraries over the last five years. In Elk Grove, the Franklin Library (opened in 2002) has seen an 88 percent increase in customers (**Table IV-21**). The Elk Grove Library, which opened in 2009, has not seen growth in the total number of customers, probably as a result of construction inconveniences and the recent opening.

Table IV-21: Five Year Total Customer Trend

Library Branch	Total Customers					5 Year %
	FY 2004-05	FY 2005-06	FY 2006-07	FY 2007-08	FY 2008-09	Change
North Natomas	1,115	2,689	4,123	5,340	7,016	529.2%
Franklin	13,281	16,998	19,900	22,027	25,065	88.7%
Valley Hi - N. Laguna	8,130	9,914	10,711	12,103	13,909	71.1%
Courtland	436	501	645	659	737	69.0%
South Natomas	27,520	28,273	27,931	29,322	33,103	20.3%
McClatchy	2,358	2,356	2,340	2,465	2,811	19.2%
Arcade	16,335	15,966	15,212	16,238	18,836	15.3%
Orangevale	6,642	6,858	6,694	6,427	7,493	12.8%
Sylvan Oaks	29,563	28,224	27,365	38,560	32,529	10.0%
Galt	11,944	11,685	11,310	12,104	12,945	8.4%
McKinley	11,954	11,713	11,494	11,687	12,898	7.9%
Arden-Dimick	22,472	22,761	21,176	21,551	24,021	6.9%
North Highlands-Antelope	40,687	39,431	38,200	38,875	42,318	4.0%
North Sacramento	7,953	7,746	7,475	7,485	8,034	1.0%
Rio Linda	5,627	5,460	4,954	5,013	5,587	-0.7%
Elk Grove ¹	39,952	38,116	35,174	34,929	39,412	-1.4%
Martin Luther King	21,614	20,279	18,969	19,506	21,225	-1.8%
Colonial Heights	25,640	23,159	22,057	22,535	25,079	-2.2%
Walnut Grove	1,376	1,356	1,260	1,283	1,337	-2.8%
Central	54,290	48,630	44,411	46,809	52,524	-3.3%
Rancho Cordova	32,167	29,716	27,661	28,036	30,990	-3.7%
Belle Cooledge	30,379	28,824	26,871	27,117	28,969	-4.6%
Carmichael	30,112	25,204	24,692	25,706	28,381	-5.7%
Del Paso Heights	8,487	7,947	7,513	7,405	7,997	-5.8%
Isleton	984	957	883	875	921	-6.4%
Southgate	24,451	22,223	20,165	20,687	22,878	-6.4%
Fair Oaks	28,121	26,249	24,104	24,038	26,063	-7.3%
Average	18,651	17,898	17,159	18,103	19,744	30.1%
Median	16,335	16,998	18,969	19,506	21,225	1.0%

Source: Sacramento Public Libraries, AECOM

¹ In FY 2008-09 the facility closed for approximately two months

The average penetration rate of total customers in FY 2008-09 into resident markets, which were defined as the typical trade area of branch libraries at 4 miles, is 17 percent. Elk Grove's two libraries are well above average at 22 and 29 percent (**Table IV-22**). Those libraries that surpass the Elk Grove Library are in smaller communities.

Table IV-22: Customer Penetration Rate

Library Branch	Customers FY 2008-09	Square Feet	Customers per SF	Penetration Rate (4 mile radius)
Walnut Grove	1,337	3,580	0.4	57.1%
Courtland	737	2,205	0.3	51.9%
Galt	12,945	4,225	3.1	44.2%
Isleton	921	1,700	0.5	41.7%
Elk Grove	39,412	13,785	2.9	28.5%
Central	52,524	12,211	4.3	24.3%
North Highlands-Antelope	42,318	12,890	3.3	22.0%
Franklin	25,065	19,621	1.3	21.7%
Rancho Cordova	30,990	12,500	2.5	18.5%
South Natomas	33,103	13,615	2.4	17.6%
Fair Oaks	26,063	12,000	2.2	13.1%
Sylvan Oaks	32,529	12,500	2.6	12.0%
Belle Cooleage	28,969	20,690	1.4	11.2%
Arden-Dimick	24,021	11,901	2.0	11.1%
Carmichael	28,381	145,000	0.2	11.0%
Colonial Heights	25,079	12,000	2.1	9.1%
Arcade	18,836	12,686	1.5	8.8%
Southgate	22,878	12,000	1.9	8.5%
Martin Luther King	21,225	15,078	1.4	8.3%
North Natomas	7,016	2,500	2.8	7.7%
Valley Hi - N. Laguna	13,909	20,300	0.7	7.0%
Rio Linda	5,587	4,000	1.4	6.2%
McKinley	12,898	4,681	2.8	4.9%
Del Paso Heights	7,997	5,425	1.5	4.6%
Orangevale	7,493	4,500	1.7	4.4%
North Sacramento	8,034	4,000	2.0	3.5%
McClatchy	2,811	2,557	1.1	1.2%
Average	19,744	14,746	1.9	17.0%
Median	21,225	12,000	1.9	11.1%

Source: Sacramento Public Libraries, ESRI, AECOM

Library Circulation

Circulation at Sacramento Public Libraries has grown on average 33 percent over the last five years. Franklin and Elk Grove Libraries have grown 21 and 18 percent respectively. Actual circulation in

FY2008-09 ranges from 9,400 to 445,000. Libraries in Elk Grove had an average total circulation in that year of 320,000 (Table IV-23).

Table IV-23: Sacramento Public Library Circulation

Library Branch	Circulation					5 Year % Change
	FY 2004-05	FY 2005-06	FY 2006-07	FY 2007-08	FY 2008-09	
North Natomas	30,961	64,588	78,012	100,396	118,841	283.8%
Arcade	75,724	267,697	205,238	205,250	221,917	193.1%
McClatchy	53,775	61,252	65,935	81,036	85,339	58.7%
Rio Linda	43,104	47,505	47,759	51,789	64,236	49.0%
Carmichael	285,919	na	293,772	376,131	405,440	41.8%
Rancho Cordova	268,522	276,387	278,123	334,709	358,575	33.5%
Colonial Heights	161,814	118,724	171,822	194,897	211,447	30.7%
Orangevale	66,893	68,095	68,949	48,615	87,236	30.4%
McKinley	120,297	123,658	128,444	137,428	153,686	27.8%
Central	346,070	324,889	330,549	392,493	433,198	25.2%
Valley Hi - N. Laguna	113,465	113,925	106,728	128,008	139,382	22.8%
Franklin	333,867	356,080	341,032	368,811	402,985	20.7%
Elk Grove	271,374	265,306	284,009	313,364	321,366	18.4%
Martin Luther King	126,606	144,431	144,057	152,737	148,178	17.0%
Fair Oaks	311,833	352,898	344,691	359,233	364,741	17.0%
Galt	115,111	121,242	124,431	127,877	134,195	16.6%
Southgate	174,505	177,902	173,689	197,273	201,665	15.6%
Arden-Dimick	319,755	352,696	321,398	329,458	365,458	14.3%
Sylvan Oaks	307,714	338,732	321,910	330,440	350,401	13.9%
Belle Cooledge	395,661	395,747	399,598	413,104	444,496	12.3%
North Sacramento	60,149	55,584	53,718	55,069	66,996	11.4%
South Natomas	265,282	249,104	241,413	271,032	286,648	8.1%
Del Paso Heights	47,578	47,980	66,940	50,873	49,079	3.2%
North Highlands-Ante	374,242	374,573	344,769	351,578	358,866	-4.1%
Isleton	21,704	22,561	24,707	20,159	20,036	-7.7%
Walnut Grove	34,150	35,320	28,159	25,832	25,316	-25.9%
Courtland	14,144	12,262	16,599	17,064	9,411	-33.5%
Average	175,564	183,428	185,424	201,284	215,894	33.1%
Median	126,606	134,045	171,822	194,897	201,665	17.0%

Source: Sacramento Public Libraries, AECOM

On a per capita basis for 4 mile resident radii, circulation for all libraries averages 2.2. Per capita circulation to Elk Grove libraries is strong, outmatched by those only in smaller communities. (Table IV-24).

Table IV-24: Per Capita Circulation

Library Branch	Circulation FY08-09	Square Feet	Circulation per SF	Per Capita Circulation (4 mile)
Walnut Grove	25,316	3,580	7.1	10.8
Isleton	20,036	1,700	11.8	9.1
Courtland	9,411	2,205	4.3	6.6
Galt	134,195	4,225	31.8	4.6
Franklin	402,985	19,621	20.5	3.5
Elk Grove	321,366	13,785	23.3	2.3
Rancho Cordova	358,575	12,500	28.7	2.1
Central	433,198	12,211	35.5	2.0
North Highlands-Antelope	358,866	12,890	27.8	1.9
Fair Oaks	364,741	12,000	30.4	1.8
Belle Cooledge	444,496	20,690	21.5	1.7
Arden-Dimick	365,458	11,901	30.7	1.7
Carmichael	405,440	145,000	2.8	1.6
South Natomas	286,648	13,615	21.1	1.5
North Natomas	118,841	2,500	47.5	1.3
Sylvan Oaks	350,401	12,500	28.0	1.3
Arcade	221,917	12,686	17.5	1.0
Colonial Heights	211,447	12,000	17.6	0.8
Southgate	201,665	12,000	16.8	0.7
Rio Linda	64,236	4,000	16.1	0.7
Valley Hi - N. Laguna	139,382	20,300	6.9	0.7
McKinley	153,686	4,681	32.8	0.6
Martin Luther King	148,178	15,078	9.8	0.6
Orangevale	87,236	4,500	19.4	0.5
McClatchy	85,339	2,557	33.4	0.4
North Sacramento	66,996	4,000	16.7	0.3
Del Paso Heights	49,079	5,425	9.0	0.3
Average	215,894	14,746	21.1	2.2
Median	201,665	12,000	20.5	1.5

Source: Sacramento Public Libraries, ESRI, AECOM

Library Programs

The resident market penetration rate of program attendance is likewise strong in Elk Grove, ranging from 2.2 to 3.6 percent. Programs at these facilities are strong in Preschool and Toddler programs.

Table IV-25: Program Attendance

Library Branch	# Programs FY08-09	Program Attendance FY08-09	Program Penetration Rate
Belle Cooledge	214	7,539	530.5%
Arden-Dimick	165	6,437	291.3%
Arcade	197	3,608	154.2%
Carmichael	248	6,851	23.4%
Central	356	10,503	9.1%
Rancho Cordova	197	7,483	3.7%
Elk Grove	146	6,951	3.6%
Fair Oaks	139	6,368	3.2%
South Natomas	209	6,082	2.4%
Galt	219	5,082	2.3%
Colonial Heights	143	3,120	2.3%
Franklin	93	5,758	2.2%
McClatchy	102	1,820	2.0%
Sylvan Oaks	158	4,595	2.0%
Courtland	139	2,838	1.7%
Orangevale	42	1,528	1.7%
McKinley	99	4,449	1.6%
Martin Luther King	137	2,896	1.5%
Isleton	161	3,493	1.4%
North Highlands-Antelope	115	2,726	1.3%
Southgate	63	1,534	0.9%
North Sacramento	69	2,399	0.9%
North Natomas	92	2,190	0.8%
Walnut Grove	56	1,098	0.6%
Valley Hi - N. Laguna	77	1,337	0.6%
Del Paso Heights	63	1,036	0.5%
Rio Linda	73	1,005	0.4%
Average	140	4,101	39%
Median	139	3,493	2%

Source: Sacramento Public Libraries, AECOM

Figure IV-7: Elk Grove Library Program Distribution

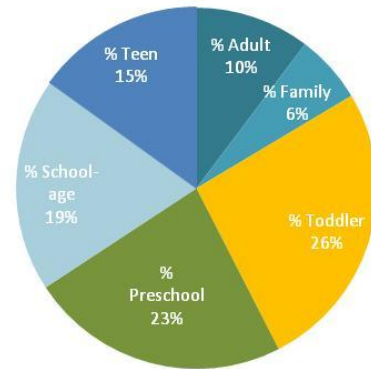


Figure IV-9: Franklin Library Program Distribution

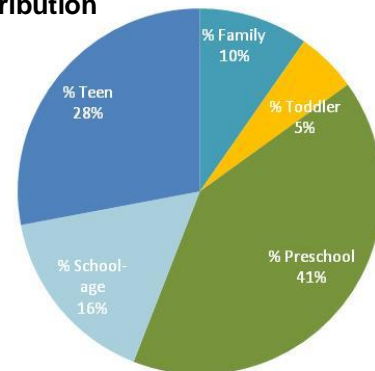
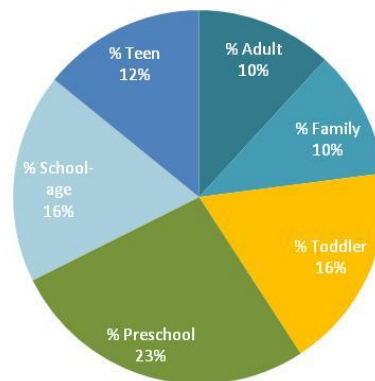


Figure IV-8: County Libraries Median Program Distribution



Profiles of Benchmark Libraries

Lafayette Library and Learning Center/Glenn Seaborg Learning Consortium, Lafayette, CA

This new Library and Learning Center in Lafayette brings together a dozen of the Bay Area's educational programs, providing a wealth of collaborative learning materials, workshops, archives, exhibits, K-12 curricula, lectures, films and discovery centers for the community. This is the first of its

kind for a public library in the United States and was named in honor of Glenn Seaborg, the Nobel Prize winner and resident of Lafayette.

The twelve organizations involved include:

- California Shakespeare Theater
- Chabot Space and Science center
- Commonwealth Club of California
- Greenbelt Alliance
- John F. Kennedy University
- John Muir Health System
- Lindsay Wildlife Musuem
- Oakland Museum of California
- The Oakland Zoo in Knowland Park
- Saint Mary's College of California
- University of California Institute of Governmental Studies
- University of California Lawrence Hall of Science

This new facility, built in the Bay Area craftsmen style, is located at the corner of Mount Diablo Boulevard and First Street in the heart of Lafayette. Killefer Flammang Architects of Santa Monica were selected through a community competition in 2003 to design the facility. The firm, which has won numerous major design awards- 28 in the last 12 years, specializes in public libraries and institutional buildings. The new facility opened in 2009 with 30,000 square feet, quadrupling the old facility size. Amenities now include:

- Community Hall (150 seats)
- Arts & Science Discovery Center for 40 participants
- Reading Court/Ampitheater
- 42 public computers, a Technology Lab, and wifi
- Teen Area, Homework Center, & 3 group study rooms
- Large adult area with quiet corners for reading
- Storytelling and class visit space for 30 children
- Outdoor meeting and reading areas
- Friends of the Lafayette Library Corner Book Shop
- Lafayette Historical Society collection



San Mateo Main Library, San Mateo, CA

The San Mateo Main Library was reopened to the public in 2006, after a dozen years of planning. In 1994, at the outset of plans for a new site the San Mateo Public Library Foundation was established to raise funds to support library services. In 1999 a \$30 million bond measure for the new main library was passed.

The new 90,000 square foot building is a three story state of the art resource center for literacy and



lifelong learning with two levels of underground parking. It features 100 public internet terminals, expanded areas for children and teens, as well as a sustainable/energy efficient design. The library has won numerous awards for its sustainable design: 2008 Association of Bay Area Governments - Green Business Certification Achievement 2008 Green Business Award San Mateo Chamber of Commerce, 2007 Sustainable San Mateo County Green Building Award, 2007 PG&E Savings by Design, 2007 Award of Excellence First Certified Green Business within San Mateo County, 2006

McGraw Hill Construction Best of Northern California Civic Award of Merit and Green Building Award of Merit, and the 2006 San Francisco Business Times Community Impact Award. The library has an ongoing public education program for sustainability as well.



Hercules Library, Hercules, CA

The Hercules Library, located on Civic Drive at Sycamore Avenue, was built collaboratively by the City of Hercules, The State of California and Contra Costa County with additional private funding. Construction was completed in 2006. The library's 21,500 square feet offers a variety of amenities, including:

- Teen Homework Center
- 2 meeting rooms
- 3 study rooms
- Sky Garden
- Children's Garden
- Reading area with comfortable seating around a fireplace
- Story Cone, a children's story area
- Friends of the Hercules Library Bookstore



Cerritos “Millenium” Library, Cerritos, CA

The Cerritos Library re-opened in March 2002 after a renovation and construction effort that totaled about two-and-a-half years. The library, often referred to as the Cerritos Millennium Library, totals 88,500 square feet, spans three stories, and was designed by CWA AIA Inc architects, with construction led by the C.W. Driver. It features a high-tech conference center, a catering kitchen, an “Old World Reading Room” with a special affiliated collection, and other themed areas with associated collections. One of the largest attractions is the 7,000 square foot Children’s Library that includes a saltwater aquarium, a model space shuttle, an arts and crafts room, rainforest and night-sky themed rooms, and about 40 computer stations.



The renovation and construction of the Cerritos library was a six year process that cost a total of \$45 million, including all interior alterations and renovations. The City of Cerritos funded the building entirely from its General Fund, which benefits from sales tax revenue from automobile sales.

Due to its location in Los Angeles County, near the border with Orange County, the Cerritos Library attracts guests and renters from within both counties. The total annual operating budget is approximately \$5 million and it is funded entirely from the City’s General Fund. Non-revenue generating programming includes: arts and crafts programs, Story-Time, video “Game-Time” for young-adults, one Shakespeare play performance per year, Author’s Series, Homework-Time, movie showings, and an academic camp during the summer called Camp Knowledge. With 102 staff, 20 of which are full-time and the remaining are part-time, the library is able to continue its full programming even amidst the downturn.

The Cerritos Library has won numerous awards including the Thea Award in 2003, the *Best Library for Children, 2008* from Los Angeles Magazine, the *Best Public Library 2004* from Reader’s Digest, and a five-star rating by *Library Journal America* in March of 2009. However, as a regional attraction the library has contended with accusations that it is not a local resource but rather a regional

destination. With many of its users originating outside of Cerritos, local residents have expressed anger at having to compete with outsiders for access to their facility. These accusations perhaps exemplify a typical challenge for modern, 21st century libraries, which aim to be sources of pride and state-of-the-art, and in doing so, extend their appeal beyond community borders.

Salt Lake City Library

The Salt Lake City Library, which opened in winter 2003, doubled the total space provided by the old library for a total 240,000 gross square feet. The library is a curving six-story facility with a pedestrian wall stretching from the ground floor plaza to the roof. The ground floor plaza has shops and services, rented out by the community including gift stores and cafés. The curving façade of the building is glass, providing visitors on any level views of the plaza, city, and Wasatch Mountains. The library also includes a 300 seat auditorium, The Canteena for young adults, a children’s library, audiovisual and technology centers, a small gallery space, and community meeting rooms.



A voter-approved \$84 million bond financed the new library as well as parking for 600 vehicles, demolition of buildings on the library lot excluding the old library, an outdoor plaza, replacement of the heating and cooling plant, and expansion of two branch libraries. The Library Board of Directors had decided to build an entirely new facility after a needs assessment completed in 1997 found the old building deficient for needed usage. The Board of Directors hired Moshe Safdie and associations in conjunction with local architects VCBO architecture to design the building, but staff were very involved in the planning and design process.



ImaginON, the Joe and Joan Martin Center, Charlotte, North Carolina

ImaginON opened in 2005 after two years of construction and six years of planning. It was built as a collaboration to meet the needs of two organizations—the Children’s Theatre of Charlotte and the Public Library of Charlotte and Mecklenburg County. The facility approaches education, learning and the arts with the shared mission of bringing stories to life. The Children’s Theatre of Charlotte was founded in 1948 and reaches nearly 320,000 children and families annually with four main programs: Mainstage productions, Tarradiddle Players, the professional touring company, and the Community

Involvement program. The Public Library system of Charlotte is known for innovation and received the 2006 National Award for Museum and Library Service for demonstrating a long-term commitment to public service through innovative programs and community partnerships such as this facility. The total project cost was approximately \$40 million, the majority of which was bond financed.



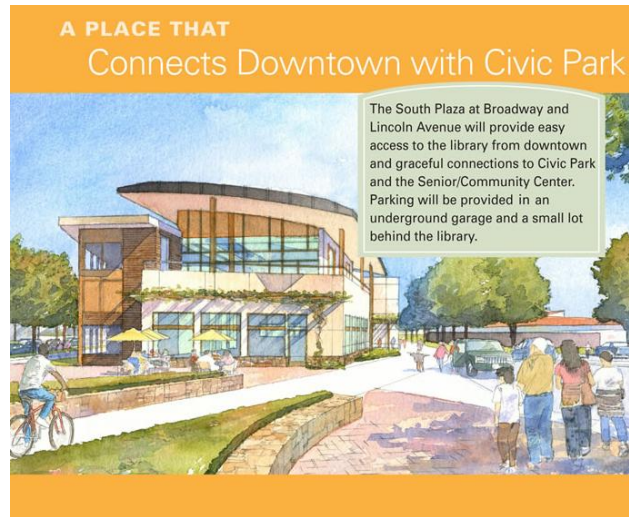
The 100,000 square foot facility includes the following amenities:

- Park Family Story Lab (8,000 SF) with computer activities designed for The Children`s Learning Center as well as changing exhibits and displays to compliment the Main Stage productions. Also serves as the center`s lobby.
- Two theaters—McColl Family Theater (570 seats) and Wachovia Playhouse (250 seats) with adjoining dressing rooms. Wachovia Playhouse is smaller and can be configured as a proscenium or thrust space. The McColl Family Theater is larger and state of the art with a full array of technical effects, a motorized lift and numerous linesets for moving scenery.
- Scene and Paint Shop for production support and staging as well as Rehearsal Rooms and a costume shop
- Spangler Library (22,221 SF) with specific areas designed for young children and those from 5 to 12 years.
- The Round reading room (1,225 SF)—main venue for library programs with built in puppet stage and sound stage, access to an enclosed courtyard, and craft friendly facilities including a sink and washable floor.
- Time Warner Cable Tech Central with 60 public access computers
- The Loft (3,900 SF) designed for teens with collections, audio/visual equipment and group study spaces
- Studio-I (1,225 SF) doubles as both a black-box and blue screen theatre.
- 2 Classrooms/Studios (900 SF and 750 SF)

Walnut Creek Downtown Library

The Walnut Creek Downtown Library is scheduled to open in 2010. With growing demand for library services, a 75 percent increase in library card holders in the last five years, the city decided to replace the 1960 building with new construction that would better meet the needs of the community. Plans for the new, 42,000 square foot building include:

- Expanded collections especially more children’s books and large print editions
- Information age resource center with 90 computers in the Technology Center, throughout the stacks, and in the Children’s Computer and Homework Center as well as wifi access
- The Children’s Wing for programs, storytelling, and reading
- Quiet reading and study areas overlooking Civic Park
- Business Resource Center
- Education and Conference Center with meeting room for 200 seats, conference room, and Technology Center
- Underground parking and improved access to the adjacent park and grounds
- Leed basic certification



The Walnut Creek Library project has required funding from a variety of sources:

- City Library Reserves contributing \$22.6 million for library, \$2.9 for the park and site improvements and another \$100,000 million for the underground parking garage.
- The Library Foundation has raised \$5 million from private sources to support construction and establish an endowment fund for operating costs
- Additional funds to meet the approximated \$42 million total capital investment will need to be raised.

Size of Comparable Libraries

The size of these comparables is roughly correlated to population size. The gross square feet per capita ranges from 0.1 to 1.6, with an average of 1.0 square feet. Based on future Elk Grove population, a new main library for Elk Grove would be between 100,000 to 200,000 square feet. Libraries throughout Sacramento County however, are branch libraries and smaller in size, with only Carmichael over 21,000 square feet.

Table IV-26: Comparable Library Gross Square Feet to Population Ratio

Library	City Population	GSF	GSF per capita
Glenn Seaborg Learning Consortium	24,000	30,000	1.3
San Mateo Main Library	93,000	90,000	1.0
Hercules Library	23,000	21,500	0.9
Cerritos Library	52,000	82,500	1.6
Salt Lake City Library	185,000	240,000	1.3
ImaginON	687,000	100,000	0.1
Walnut Creek Downtown Library	64,000	42,000	0.7
Average	161,143	86,571	1.0
Median	64,000	82,500	1.0

Source: Individual Libraries, U.S. Census Bureau, 2006-2008 American Community Survey, ERA AECOM

Program Recommendations

Newly built libraries signal a shift in the role libraries play in communities. Libraries are now more responsive to community needs than repositories for printed material. Most provide a slew of expanded services with the following amenities:

- Early childhood to senior programs
- Access to technology with computer stations and/or wifi access
- Rental space and meeting rooms available for reservation
- Retail opportunities
- Café and dining options
- Gardens
- Theaters for cultural programs
- Age focused areas for children’s storytelling, teens, and toddlers
- Elegant architecture built for sustainability
- Gallery space for visual arts collaborations and/or exhibitions

Based on the demand for library services seen through all Sacramento Public Library data and our survey of comparable institutions, ERA recommends a library of 80,000 to 100,000 for Elk Grove in 2015. At this size, a new facility would become the main library for Elk Grove, providing a catalytic impact for the development and drawing residents to the site. Further conversations and negotiations will need be organized with the Sacramento Public Library system, who we assume will operate the

facility. On an annual basis, the operating expenses would be \$2 to \$3 million. The capital requirement for a new library varies widely depending on the size, architecture and amenities. Sacramento Public Libraries are generally built for \$350 per gross square foot plus an additional \$1,000 per program square foot for books and amenities.

Performing Arts Center

To assess potential market demand for a performing arts center, ERA reviewed national trends for these facilities, looking at financial and operating profiles as well as audience characteristics, interviewed stakeholders and community members, and surveyed the existing performing arts centers in the Sacramento region.

National Trends in Performing Arts Facilities

There are a number of issues currently affecting the viability of performing arts facilities nationwide, including sources of income and budget size, operational structure, marketing trends, and size of facilities.

Financial Profile

Performing arts facilities typically generate revenue from two major categories: earned revenue and contributed income. Major revenue sources vary depending on the operational model for the facility. For most performing arts facilities, they are as follows:

- Ticket sales and/or subscriptions;
- Preferred seating income;
- Rent from anchor tenants;
- Ticket surcharges and box office fees;
- Food and beverage sales;
- Parking revenue, premium parking opportunities, and valet services;
- Tuition from lessons and classes;
- Sponsorships and naming rights;
- Government support;
- Private donations and corporate contributions.

For most facilities, earned income sources are enough to cover between 40 and 60 percent of a performing art center's budget. The remainder of the budget must be raised through contributed income and/or other income sources. It is generally true that contributed income is a necessary and substantial source of income for operating a performing arts facility.

Operational Structure

The operational choices made by a theatre have a direct impact on the bottom line, particularly as related to professional staffing costs. Successful facilities need to rely on two to three approaches to develop sustainable programs. As shown below, performing arts centers can generally be categorized in three ways depending on their operations and management structure:

- Production houses – The theatre produces shows in-house, hires performers, markets programs, manages ticketing, etc. Facility owners / managers take all of the financial risk for the performance.
- Presentation houses – The theatre contracts with a local or outside group to present performances at the facility. In this case, the facility may contract to buy or sell additional services such as marketing, ticketing, etc. Thus, the facility carries some of the financial risk, but also benefits from presumably higher-priced tickets and well-known shows/performers who are not affiliated with the facility.
- Rental houses – An outside group rents the house to produce a show, often for a set fee or sometimes for a share of ticket revenue. In this case, there are few if any additional services offered by the facility. In this case, the venue is rented on more of a “turn-key” arrangement.

Modern theater venues usually need to operate in at least two of the above roles to approach operating profitability, and many theatre facilities exhibit all three components in their program and structure.

It is also important to emphasize the distinction (and competition between) theatre venues and independent performing arts user groups, both of which are now increasingly producing events. The result, a blurring between facilities and users, is further complicated by funding sources and the hard reality that performing arts and related educational programming are inherently unprofitable from a purely financial standpoint; large amounts of public and private subsidies are often necessary to sustain operations.

The path of these funds can either go directly to a performing organization, or to the venue that provides space at a minimal cost or free of charge. Given these factors, the financial feasibility of any venue-project is closely tied to the ability to increase the funds available to the arts and educational community.

Shift in Marketing Strategies

A result of lagging ticket revenues has been the restructuring of marketing strategies. Most producing and presenting venues are returning to subscription-based pricing strategies, offering one “mega ticket” that is good at multiple venues and events, buy-one, get-one-free deals, or create-your-own subscription series. Common add-ons include free parking and snack vouchers. Many venues are

also using themes to enhance or re-brand their image. Other venues have designated “Theatre Thursdays” and singles’ nights to appeal to younger audiences. However, aggregate data suggests that despite marketing, audience development efforts and ticket cost increases (which increased by 70% between 1985 and 1995 for orchestras), performing arts venues are still subject to market preferences and economic cycles.

Facility Seating Capacity and Physical Features

A multitude of new performing arts spaces have been constructed in the last 30 years, many of which were financed by public funding. However, when facilities are built, it is not always clear who will use the spaces or whether their operations will be sustainable.

Size of Facility

There is a growing difference in venue programming according to venue size. The high cost of operating larger facilities requires them to seek blockbuster productions, sometimes limiting artistic creativity. This is often referred to as the “Nutcracker Effect.” The high costs of operating larger facilities require programmers to sell as many tickets as possible and capture all possible earned revenue; large blockbuster-programs are most likely to achieve this goal. Smaller venues are able to rely on a combination of niche programming and lower operating costs to remain viable. Midsize facilities are focusing more on traditional works.

Other relevant issues related to facility design and seating capacity are as follows:

- The need for flexibility is imperative. As the performing arts grow and change, venues need to be able to accommodate and foster the creativity and change that allows performing arts organizations to stay cutting edge. Facilities that limit growth and creativity, due to their rigid design and/ or large size, are at risk of becoming obsolete.
- Increasingly, new theatre venues are developed as multi-tiered performing arts complexes, offering between two and five different performing venues within one facility. Construction of such facilities allows for economies of scale, as the overall cost of building multiple theatres in one venue is much lower than if each theatre were built separately. Moreover, such facilities offer a space for many types of performing arts groups and are often designed to be flexible in seating and programming capacity.
- The role of performing arts facilities is changing. Industry professionals agree that in major areas, performing arts facilities must act as community centers, evolving into places where people congregate and share in social engagements. Larger, first-tier centers must help cultivate smaller artists in the community through posting advertisements for small-venue events, or house-concerts, on websites or in existing venues. Venues are increasingly

viewed not just as a place to showcase performing arts displays, but as cultural centers that uphold and inspire participation of all in performing arts.

- There has been a recent trend towards the development of small- to mid-sized venues, reflective of product diversification in a market despite an abundance of arts organizations and performers who can easily sell 2,000-5,000 seats. Many of the major companies in the United States have indicated a preference towards performing multiple times in mid-size venues or in large venues that are designed to feel more intimate. Audiences have responded well to this, as many seem to prefer paying for an intimate experience.

Trends in Audiences

Nationwide, the percentage of total population attending performances in the performing arts has declined since 1982. This suggests that audience growth has not kept pace with population growth. Younger audiences are less likely to frequent performing arts performances than older audiences.

Table IV-27: Percent of Adults Participating in 12 month Periods

	1982	1992	2002	2008
Jazz performance	9.6%	10.6%	10.8%	7.8%
Classical Music	13.0%	12.5%	11.6%	9.3%
Opera Performance	3.0%	3.3%	3.2%	2.1%
Musical Play	18.6%	17.4%	17.1%	16.7%
Non-Musical Play	11.9%	13.5%	12.3%	9.4%
Ballet	4.2%	4.7%	3.9%	2.9%
Other Dance*	n/a	7.1%	6.3%	5.2%
Latin Music	n/a	n/a	n/a	4.9%

*Other Dance refers to dance not ballet, including modern, folk and tap.

NA: data not collected in that year

Source: 1982,1992,2002 and 2008 Surveys of Public Participation in the Arts, National Endowment for the Arts

According to the age distribution data tracked for a period of 12 months for the 2008 National Endowment for the Arts Participation in the Arts Study, the largest percentage of total performing arts audience participation are between ages 45 and 54. Latin music performances have the strongest young audience participation rate at 18.2 percent. Classical music has the largest percentage distribution for persons 75 and over.

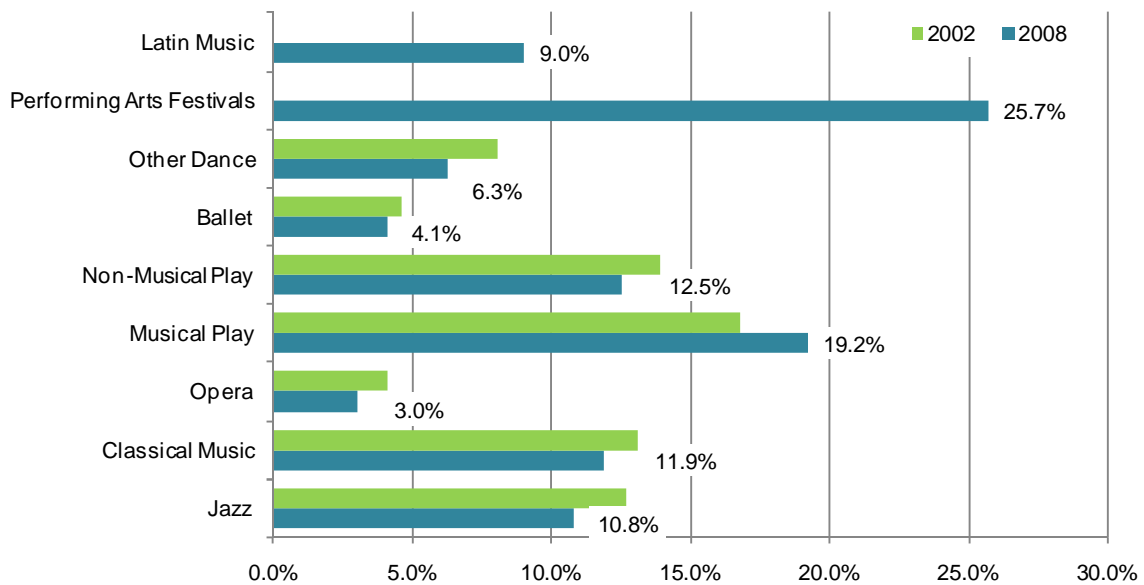
Table IV-28: Age Distribution of Adults Attending at Least Once in 12 Months, 2008

Age	US Total	Classical			Performing Arts			Non-musical		Other Dance
		Jazz	Music	Opera	Latin	Festivals	Musical Plays	Plays	Ballet	
18-34	12.8%	11.9%	9.5%	7.4%	18.2%	13.2%	11.1%	11.2%	10.8%	14.0%
25-34	17.7%	17.4%	13.3%	13.9%	21.8%	19.4%	16.9%	17.2%	14.1%	15.9%
35-44	18.6%	17.1%	17.8%	21.9%	24.0%	21.7%	20.2%	17.7%	21.8%	17.0%
45-54	19.5%	24.4%	21.4%	21.6%	17.5%	22.0%	20.3%	18.1%	21.2%	19.8%
55-64	14.8%	18.4%	18.5%	16.6%	13.8%	14.7%	17.3%	19.5%	15.4%	19.0%
65-74	8.8%	6.9%	11.6%	12.1%	3.6%	6.6%	9.5%	10.3%	13.0%	10.5%
75 and over	7.6%	3.9%	8.0%	6.5%	1.2%	2.5%	4.5%	6.0%	3.7%	3.8%

Source: 1982, 1992, 2002 and 2008 Surveys of Public Participation in the Arts, National Endowment for the Arts

In the Pacific region, which includes California, Alaska, Hawaii, Oregon, and Washington, percent participation in a variety of performing arts has fallen in all categories from 2002 to 2008, except for musical plays. Data collected for 2008 only also shows a strong participation rate for performing arts festivals at 26 percent.

Figure IV-8: Percent Participation Rates for Pacific Region 2002, 2008



Stakeholder and Community Interviews

A summary of findings from stakeholder and community interviews is as follows:

- Community dance schools use existing facilities with around 700 seats for dance recitals and performances in December and June. Demand for dance classes in Elk Grove is strong and the largest dance school is planning to build their own facility.
- The high school theaters schedule these groups a year in advance and are not able to accommodate all interested users. The district has priority use for these facilities and covers approximately 80 percent of the availability. The remaining 20 percent can be filled by the community. Community theatre productions are not well accommodated by the high schools due to restricted availability.
- Runaway Stage Productions, a non-profit educational stage company, is interested in a facility in Elk Grove. A good number of performers and organizers live in Elk Grove. Required usage would be for alternating months during the year. The company puts on 6 Broadway musicals, 6 children's productions, and 6 workshop productions annually. The company currently spends approximately \$30,000 on rent for performance facilities and an additional \$30,000-\$40,000 for rehearsal space rental. The organization's annual operating budget is \$250,000 per year funded by ticket sales. To relocate the company needs a 250-300 seat theater with a proscenium stage, dressing rooms, wings, rehearsal space, and an orchestra pit to accommodate an 18 piece orchestra.

Elk Grove Existing Supply

Elk Grove surveyed the existing performing arts facilities in Elk Grove:

- Cosumnes River College Theater- 350 seat theater with three dressing rooms, a costume shop, and a green room that also serves as a make-up room. Accommodates roughly 80-100 performances per year. This facility is not rented out to outside groups and is used only by the theatre department at the college.
- Elk Grove Unified School District, Franklin and Cosumnes Oaks High School Theaters- both are approximately 700 seat theaters with proscenium stages. There are adjoining amenities including green rooms and limited back of house. The theaters are primarily used for district needs including school productions, assemblies, etc. Rentals to community organizations are schedule a year in advance. Utilization is at staff capacity. Rental fees are typically \$1500 per day.

Regional Case Studies

As illustrated in Figure IV-9 below, there are a number of performing arts venues in the Sacramento region. Profiles on two of the largest new facilities, Mondavi and Gallo, are included below.

Figure IV-9: Location and Size of Regional Performing Arts Facilities



Source: ESRI, ERA Survey of Individual Facilities.

The Mondavi Center for the Performing Arts, UC Davis

Named after Robert Mondavi, this facility on the campus of the University of California at Davis opened in the fall of 2002. The project was a \$60.9 million investment that was financed through a \$30 million capital campaign, University discretionary funds, and a loan. Barbara Jackson, after whom one of the facilities is named, made a \$5 million donation.

The facility is managed by the Mondavi Center, which was formerly UC Davis Presents. UC Davis Presents was an organization that was part of University Events and presented lectures, productions, and other events by popular speakers, artists, and groups in the various venues around campus. The completion of the Mondavi Center provided a center for this organization group to hold all of their presentations. The facility operates with a memorandum of understanding between the Mondavi Center and UC Davis that designates the physical facility as a self-sustaining entity. However, all employees are considered University staff.

The two facilities, the Jackson Hall and Studio Theatre are state-of-the art. The Theatre, Music, and Dance Departments at UC Davis are considered resident companies at the Mondavi Center, although they pay the same rental rates as do other rental groups at the Mondavi Center. The following is a description of each of the two facilities.



- Jackson Hall - This facility is a 1,801 seat proscenium space that is designed to feel intimate despite its size. There are 1,106 seats at the orchestra level, 341 Grand Tier seats, and 354 Upper Tier seats. The major attractions include the state-of-the-art lighting and sound system, with an acoustical curtain that controls reverberation, enhances positive sound, and shapes dialogue. There are 2 two-person dressing rooms, 2 six-person dressing rooms, 2 twelve-person dressing rooms, and a fully equipped green room with a courtyard. The facility has been rented by the Sacramento Philharmonic Orchestra, the Sacramento Opera, the Sacramento Youth Symphony, the Sacramento Choral Society, Chanticleer, the Auburn Symphony, and American Bach. The UC Davis Dance and Music Department use this space frequently. The Mondavi Center charges \$1500 and \$2000 per day for non-profit and for-profit respectively. Alternatively, the space rents for 10 percent of ticket sales up to a \$3000 maximum daily fee. For rehearsal time, the facility can be rented for \$800 and \$1000. Jackson Hall has roughly 124 performances and 210 usage days per year. This is a combination of the performances that are put on by self-presenting groups, or standard renters, performances presented by the Mondavi Center, and performances by the University's Dance, Theatre, and Music Departments.
- Studio Theatre - This is a 250 seat, flexible space that can comfortably accommodate 200 people for theatre, 250 people for lectures, and 200 people for banquets. The theatre features variable acoustics, tiered seating, and a glass window with a scenic overlook. The facility is also equipped with state-of-the-art lighting, sound, and staging capabilities. The facility rents for \$50 and \$100 per hour for up to a maximum of \$450 and \$800 for non-profit and for-profit respectively. This facility is used mostly by the UC Davis Theatre company for their performances. Additionally, there are multiple events unrelated to performing arts shows that take place in Studio Theatre, such as awards ceremonies, lectures, rehearsals,

dinners, and experimental shows. There are approximately 96 performances in the Studio Theatre per year and 210 days of use.

Both The Studio Theatre and Jackson Hall are rarely in use during the summer months.

Gallo Center for the Arts

Planning efforts to build a performing arts facility in Modesto began in 1997 as a partnership between a private non-profit organization, the Central Valley Center for the Arts (CVCA) and Stanislaus County. The \$34 million project was financed with a \$15 million commitment from the County Board of Supervisors, bond financing and a land grant from the County worth \$2.5 million. Half of construction costs were contributed by approximately 2,200 individuals and companies who donated \$19.7 million to CVCA. An endowment fund to ensure ongoing operations of the facility was contributed by two major donors, \$10 million from the Ernest and Julio Gallo families and \$5 million from the Mary Stuart Rogers Foundation. The facility is solely owned by the county and leased annually for \$1 to the CVCA for operation.

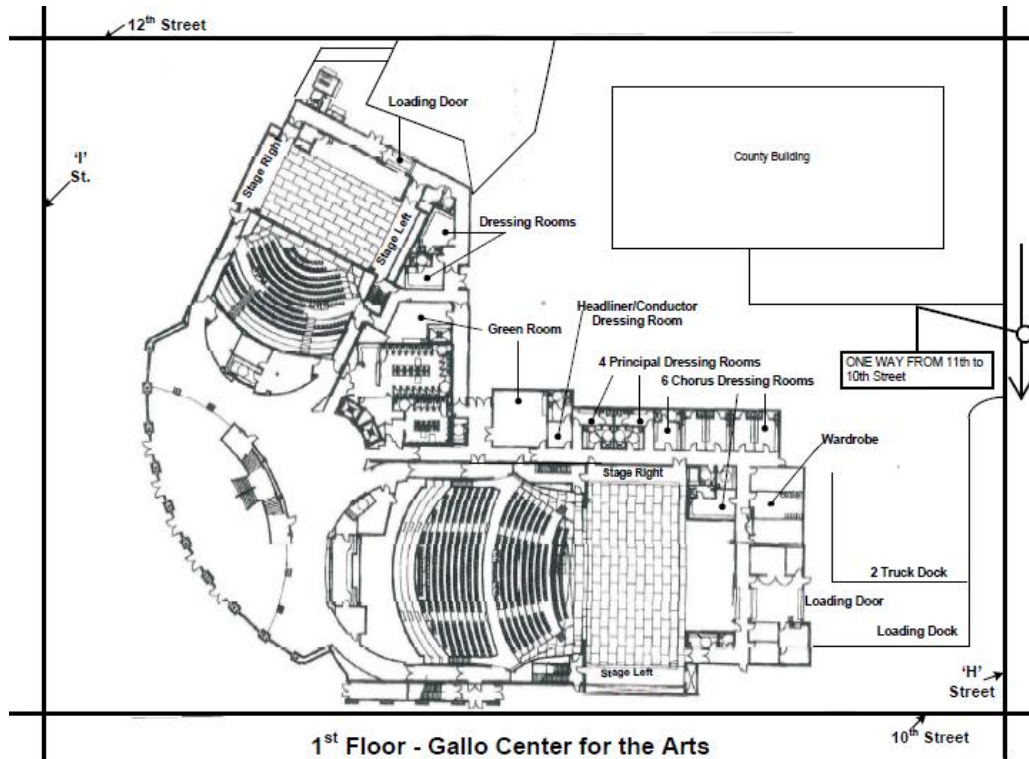
In 2008, the CVCA annual operating budget was \$7.8 million, with \$4.3 million earned from ticket sales, rentals, concessions, parking and other earned income opportunities. Another \$3.9 million is direct public support.



The Gallo Center for the Arts includes two performance facilities:

- Mary Stuart Rogers Theater- 1,200 seat theater with proscenium stage and orchestra pit with capacity for 40 musicians. One adjoining headliner/conductor, 4 principal, and 6 chorus dressing rooms. Rear loading dock and state of the art lighting and audiovisual equipment. The theater is intended to accommodate a wide spectrum of programs ranging from classical music concerts and theater to all amplified popular entertainment events. The audience chamber is designed to provide sufficient volume in the hall to develop the degree of reverberation needed for classical music or for speech alone. This ability to “tune” the room acoustics gives a great range of control and choice to theater directors, conductors, and performers. To favor classical music acoustics the theater was built in the traditional shoe box style with one balcony.
- Foster Family Theater- 400 seat theater with proscenium stage and orchestra pit with capacity for 20 musicians. Two adjoining chorus dressing rooms, a loading dock, and orchestra shell that can be stored in the scene dock upstage. State of the art lighting and

audiovisual equipment. The narrow dimensions of the Foster Family Theater are favorable for un-amplified voices with the farthest seats being within 60 feet of the proscenium to enhance the sense of acoustical intimacy throughout the hall.



Findings and Recommendations

There have been a number of recent developments of performing arts facilities in the Sacramento region. The market demand for performing arts facilities is varied and not overwhelming. We recommend that space be left available for potential future development at the civic center site. Early development of a purpose built performing arts venue would require user group buy-in for partial capital investment and an anchor tenancy.

Other Potential Cultural Uses

Arts Center

To assess potential demand for an Arts Center, ERA interviewed key stakeholders in the community and visited relevant existing facilities. A summary of findings and recommendations is below:

- The Elk Grove Fine Arts Center was recently opened in a 1,200- 1,500 square foot space in old town. This facility provides workshops for adults and children and organizers wanted to be part of the old town district.

- Demand for children’s art classes currently offered by the CSD are at a 31 percent capacity rate and the currently used facilities, the Wackford Center, Valley Oak Room, Pavillion, Laguna Town Hall, and Elk Grove Recreation Center are sufficient.
- Gallery space to display work is need for an annual exhibition and somewhat on an ongoing basis. We recommend that the civic center include temporary art exhibition space that is accessible to the public.
- Arts festivals are extremely popular in Elk Grove.

Veteran’s Memorial Hall

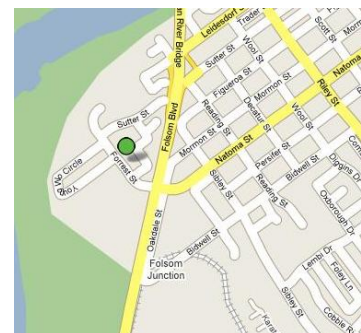
To assess the viability of a Veteran’s Memorial Hall, ERA researched similar facilities in the Sacramento region and interviewed Veteran’s Affairs. There are three distinct opportunities for development:

- Veteran’s Halls- available for veterans’ use with no memorial component. These can be owned by veteran’s associations or leased to them as operators. These facilities are available for non-veterans’ uses as available after organizational functions. Amenities include multi-purpose rooms, kitchens, and flexible halls.
- Veteran’s Memorials- honorary tributes, sculptures, plaques and so forth commemorating veteran service. Not a facility for veteran and community use.
- Veteran’s Memorial Halls- a combination of the above.

No funding is available through Veteran’s Affairs to build these facilities and capital financing varies widely. Funds for memorial halls can be generated through a Mill Tax, an incremental property tax hike, but this has not been successful in the region. Public private partnerships have allowed capital funding for some veteran’s halls, but most typically funds are fundraised through private non-profits with the help of local veteran’s associations and service offices.

Folsom Veteran’s Hall

The Folsom Veteran’s Hall, located at 1300 Forrest Street, was built by a local developer in partnership with the City. It is owned to the city and lease d to a cooperative of veteran’s associations. Operating groups use the facilities a few times a week and rent the space to other community groups as available. The hall seats 150 assembly style and 74 for dining. Other amenities include a canteen/bar and kitchen. The rental is \$500 for 12 hours. All operating revenue funds veterans’ services or a scholarship fund.



Veteran’s Memorial Center, Davis

This Veteran’s Memorial Center was built by the City of Davis, who leases it to the Veteran’s Service Office. Veteran’s use of the facility is free, other organizations can rent space as available. It is located at the corner of East 14th and B Street near the Veteran’s Memorial Center Theatre (325 seats).

The center includes a multi-purpose room, club room, large kitchen with commercial food preparation facilities, and a game room. It regularly hosts Yoga and Pilates classes, church services, community meetings, and weddings. Rental rates vary by usage, with significant discounts for youth co-sponsored and community groups. Hourly Rates for the entire facility range from \$29 to \$284.



Roseville Veteran’s Memorial Hall

The original portion of the building was built in 1929. It was expanded in 1949 to its current configuration, more than doubling its size. The building is located at the north end of Royer Park. The original Icehouse Railroad Bridge has been relocated near the building to provide convenient access to public parking. Portions of the Hall may be rented on a space-available basis.

Table IV-29: Roseville Veteran's Memorial Hall Characteristics

Hall Occupancy	~300
Kitchen Facilities	Y
Chairs, tables available?	Y
PA or sound system available?	N
Halls:	Rental Fees
Main	\$75-300
Basement	\$60-90
Service office	\$30-\$60
Ladies Logde Room	\$90
Fireplace Room	\$60

Source: Placer County California



Auburn Veteran’s Memorial Hall

This Memorial Hall was built in 1931 and dedicated in January, 1932. The dining hall and dance floor were expanded after World War II. To meet the condition that the bar be an appropriate distance from the Lincoln Way Elementary School - now the Auburn City Hall - the bar was placed at the far end of the building. Portions of the Hall may be rented on a space-available basis.

Table IV-30: Auburn Veteran’s Memorial Hall Characteristics

Hall Occupancy	~225 downstairs
Kitchen Facilities	Y
Chairs, tables available?	Y
PA or sound system available?	n/a
Halls:	Rental Fees
Downstairs	\$150-\$200
Fireside Room	\$50
Upstairs	\$250

Source: Placer County California



Loomis Veteran’s Memorial Hall

Built at the end of the 1940s, the Memorial Hall is located on the same grounds as the Loomis Library and shares parking facilities. It is the main community facility in Loomis. In addition to Loomis veterans, the building is used by many community organizations, groups and individuals. Portions of the Hall may be rented on a space-available basis.

Table IV-31: Loomis Veteran’s Memorial Hall Characteristics

Hall Occupancy	~225
Kitchen Facilities	Y
Chairs, tables available?	Y
Air conditioned	Y
PA or sound system available?	Y
Halls:	Rental Fees
Meeting room	\$50-\$100
Main hall	\$150-\$300

Source: Placer County California



Lincoln Veteran’s Memorial Hall

Located in downtown Lincoln, the Memorial Hall is used by many community organizations, groups and individuals. Portions of the Hall may be rented on a space-available basis.

Table IV-32: Lincoln Veteran’s Memorial Hall Characteristics

Hall Occupancy	~250
Kitchen Facilities	Y
Chairs, tables available?	Y
Air Conditioned	Y
Halls:	Rental Fees
Hall	\$200-\$300
Dining Room	\$50
Kitchen only	\$50

Source: Placer County California



Botanical Garden/ Garden Attraction

During the course of our market analysis, the City requested that ERA AECOM consider the market potential for some type of botanical garden, with the idea that it could serve as a regional attraction that is unique to the Sacramento area. Since garden attractions vary widely, we reviewed major types of gardens and outline basic operating, size, and examples for the following three types of gardens:

- Full scale botanical garden
- Specialty gated and non-gated gardens
- Garden Centers

The Sacramento region currently has no visitor destination garden attractions, so the inclusion of one in the Elk Grove Civic Center project could serve to draw regional visitors, one of the goals for the new Civic Center.

Full-scale Botanical Garden

ERA AECOM completed a survey of national botanical gardens and conservatories.

- Botanical gardens are a combination of outdoor gardens adapted to a site’s climate zone and green house conservatories with a variety of foreign plant species on display.
- Most gardens are private non-profit institution, with the exception of a few which are managed by municipal governments.
- Grounds range in size from approximately 10 to 14,000 acres. Most are between 30 and 80



acres. Conservatories range in size from 1,000 to 220,000 square feet.

- Brief descriptions of various gardens are as follows:
 - 7,000 desert and tropical plants, birds, terrarium
 - 3,000 species of alpiners and rare native plants
 - Gardens, 2 conservatories, 11 produce greenhouses, butterfly center, 7.5 acre vegetable garden
 - Tropical garden with rainforest and seasonal forest
 - Downtown garden with 20,000 plants
 - 2,000 species of tropical rainforest and native plants
 - Tropical, palm, cactus, bonsai, orchid display
 - 13 rooms (palm, fern, orchid, desert, children’s discovery garden) in conservatory
- Adult admission is generally around \$10
- Membership programs are common, revenue supports operations and engenders future support
- Attendance can range widely from 50,000 to 400,000. Very few gardens achieve attendance above 400,000.
- Depending on the scope of the attraction and nature of the market, attendance to botanical gardens can be either resident or tourist driven.
- Annual operating budgets range widely from \$1 million to \$13 million.



Specialty Gardens

Specialty gardens are much smaller than full-scale botanical gardens at 1 to 5 acres. When gated, admission fees are less than the larger botanical garden attractions, but can also be free to the public. These gardens are run by private non-profits or municipal governments.

ERA AECOM reviewed four specialty garden attractions including the Lan Su Chinese Garden in Portland, the Seattle Chinese Garden, the Japanese Tea Garden in San Francisco, and the Rose Gardens in Portland.



Table IV-33: Specialty Garden Attraction Characteristics

Gated Garden Attraction	Size	Adult Admission	Operating Structure
Lan Su Chinese Garden, Portland	40,000 SF	\$8.50	Owned by City of Portland, leased to private non-profit
Seattle Chinese Garden*	4.6 acres	fee not set	private non-profit
Japanese Tea Garden, San Francisco	3.1 acres	\$5.00	Operated by City, vendor for visitor services
Rose Gardens, Portland	4.5 acres	Free	Operated by City, private non-profit for store

*Under Constructin, completed by 2020
 Source: Individual gardens, ERA AECOM

Specialty gardens offer appealing visitor experiences for local visitors and can attract tourist visitation.

The traditional Chinese and Japanese gardens feature small architectural highlights, picturesque scenery, and specialized visitor amenities include gift shops and tea houses. The Rose Gardens in Portland are not gated, but have similar visitor appeal with approximately 10,000 varieties of roses. These are a considerably less costly, both at investment and on an ongoing operating basis than full scale botanical gardens. These attractions do not draw the same number of visitors, but can add considerable civic appeal and traffic.



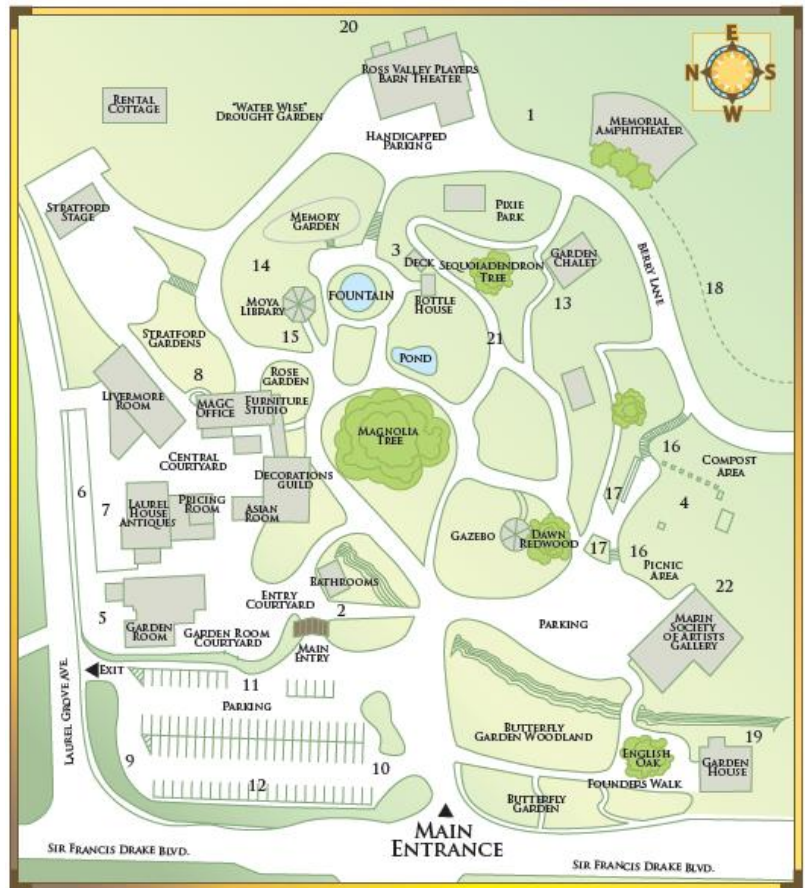
Garden Center

Garden Centers are combination art, community, event, education, and garden facilities. These centers have an educational and resource mission, providing the community with access to garden education, scenic outdoor events, and arts activities. The best example of this model in the bay area is the Marin Art and Garden Center.

Marin Art and Garden Center Profile

The mission of the Marin Art and Garden Center (MAGC) is to be a vibrant, enriching community resource that supports and encourages the arts, horticulture, history and environmental conservation, providing the community with a unique gathering place to participate in the arts and educational programs. MAGC is a non-profit organization staffed primarily by volunteers and funded through contributions, memberships, and rental fees.

Education programs, which are organized by a dozen supporting organizations which use the facility, include summer camps, classes for adults and children, and school programs. Other events include lectures, performances, and center wide festivals. MAGC has also been awarded the “Best Event Site in the North Bay” three years in a row by local publications. Rentals at the facility range widely from weddings, receptions, fundraisers, conferences, and memorials.



MAGC includes 6 buildings across eleven acres. Amenities include:

- Garden House
- Marin Society of Artists Gallery
- Stratford Stage
- Ross Valley Players Barn Theater
- Memorial Amphitheater
- Moya Library
- Furniture Studio
- Decorations guild
- Asian Room
- Laurel House Antiques
- Butterfly Garden
- Gazebo

V. Market Assessment for Public Assembly and Community Facilities

Potential Users

Research indicates that the local community would support the following types of events in the proposed public assembly/event facility:

- Weddings and other reception/party events
- Meetings and conferences, both for corporate groups and public associations and government agencies.
- Trainings and seminars for the expanding medical community.

A list of potential user groups that were interviewed in the research process is shown in the Appendix. Key findings from these interviews, based on user-type, are detailed below.

Wedding/Event Planners

Our interviews with event planners indicated that weddings were the number one type of events planned for Elk Grove residents. There was a strong consensus that Elk Grove residents would use and event space for weddings if a few key criteria were met:

- There were spaces for a ceremony and a reception.
- The reception hall could accommodate up to 200-300 people for seated meals and a dance floor.
- The kitchen should be large enough and well-equipped so that the catering staff can prepare either a sit-down meal or a buffet.
- The facility has attractive chairs, tables, and a dance floor for rent.
- The facility has large windows, with nice views, adjustable lighting, plenty of outlets, and an indoor/outdoor space.
- The entrance to the event facility is aesthetically pleasing.

It was noted that these features will also enhance other events, such as anniversary parties, bat mitzvahs, anniversary and birthday parties, and debutante balls. Currently, there is a “lack of adequate space” in Elk Grove for wedding and party events, and most residents choose to hold their event outside of the city. A description of facilities in Elk Grove that currently host weddings are shown in **Table V-1**, and a summary features and drawbacks of each facility is detailed.

Furthermore, a list of popular wedding and event venues outside of Elk Grove is shown in **Table V-2**. Our research indicates that an event center with the characteristics described above would attract weekly weddings, especially on Saturdays.

Elk Grove Chamber of Commerce

According to staff at the Elk Grove Chamber of Commerce, there is consistent need for event space for daily and nightly meetings, luncheons, mixers/happy hours, and educational seminars. It was estimated that the Chamber currently hosts between five and six events per month for a variety of groups sizes, from 10 to 250 people. The venues used for these events are often restaurants, the hotel facilities, Valley Hi Country Club, Phoenix University facilities, and DeVry University facilities. A new facility within the Elk Grove Civic Center would be welcomed and recommended design features include:

- A good PA system
- Catering facilities
- Computer work-stations
- Wireless capabilities
- Capability for webinars
- Wireless internet

Table V-1: Description of Local Event Facilities

Facilities Used in Elk Grove	Reception		Seated Capacity	Rates ¹	Features	Challenges
	Capacity	Capacity				
Valley High Country Club	~300	250	\$5,000 plus additional charges	In-house catering, tables, chairs, linens, golf course	Odd shaped main room, service is low-quality, ceremony location not private	
Holiday Inn Express	150	125	\$1,500-\$2,800 (Saturday)	Ballroom for 125-150, tables and chairs	Poor ambiance, no in-house catering	
Hilton Garden	125	100	\$1,500 (lower when catering is done in-house)	Ballroom for 100 with in-house location	No area for a ceremony	
Asian Sports Foundation	1759	821	\$1,600 for 4 hours, \$220 per additional hour	Large gymnasium for large group, well-equipped kitchen	Not and elegant environment, no location for ceremony	
Pavilion at Elk Grove Park	200	125	\$1,500-\$1,850 ²	Good community room with ample parking, recently remodeled bathrooms, windows with park views, seating for 125 with a dance floor, "prep" kitchen, ceremony site close-by	Plated meals not recommended due to lack of cooking facilities	
Laguna Town Hall	400	300	\$1,750	Large facility with stage, "prep" kitchen, and amphitheater for ceremony	Gymnasium environment, lots of community flyers and postings, so not elegant. Kitchen facilities inadequate for plated meals	
Barbara Wackford Community Center	300	200	\$1,700-\$3,500 ³	Busy community center, with a ballroom, floor-to-ceiling windows, new facility	Floor-to-ceiling windows look onto parking lot, patio looks onto parking lot, no place for ceremony, kitchen problematic for caterers, parking can be problematic	

¹ Does not include equipment rental, labor charges, catering costs, or other fees.

² Pavilion with Strauss Island for ceremony

³ 12-hour Saturday rental, including gymnasium
Source: Selected Interviewees and ERA/AECOM

Table V-2: Popular Event Venues in outside of Elk Grove

Venue	City
The Old Sugar Mill	Clarksburg
Granite Bay Golf & Country Club	Granite Bay
Lincoln Hill	Lincoln
Masonic Temple	Sacramento
Citizens Hotel	Sacramento
Sterling Hotel	Sacramento
Dante Club	Sacramento
Sierra 2 Theater	Sacramento
Casa Garden Restaurant (for fundraisers)	Sacramento
Hyatt Hotel	Sacramento
Sacramento Grand Ballroom	Sacramento
La Rivage	Sacramento
The Vizcaya Hotel,	Sacramento
The Grand Island Mansion	Walnut Grove

Source: Selected Interviewees and ERA AECOM

Hospitals

ERA interviewed CEO’s from two of the three major hospitals in the region to better understand the medical community’s current and projected need for event space. Both leaders indicated that event space at the proposed Civic Center would be used for a variety of different types of events, namely:

- Fundraisers
- Community outreach and awareness campaigns
- Quarterly and annual staff meetings
- (Bi)-annual dinners for foundations affiliated with the hospitals
- Medical conferences and meetings
- Trainings and seminars, including technical trainings and educational certification

Examples of venues that are currently used for hospital functions include Valley Hi Country Club, HomeTown Buffet, the Sheraton in Sacramento, the Holiday Inn Express in Elk Grove, and other spaces in Sacramento. It was stated that the Valley Hi Country Club has provided “mixed-experiences,” the Sheraton did not have adequate space for vendors and sponsors, and the other two venues had “poor food service.”

Both Sutter General Hospital and Methodist Hospital of Sacramento are planning major expansion projects within Elk Grove, and it is rumored that Kaiser Permanente will also be expanding into Elk

Grove. The interviewees specified that the following characteristics of a meeting/event space would best suit their needs:

- Executive board rooms with capacity of between 100 and 200, and smaller break-out rooms.
- A main ballroom area with theater-style seating capacity of around 500 and dining capacity of at least 200.
- Wireless capabilities and high-quality projector equipment for computer demonstrations.
- A large lobby area for vendors and sponsors, who are critical in defraying the costs of medical events.
- A catering kitchen.

It was stated that Methodist Hospital of Sacramento would likely use a new conference/event space at least once a month, but probably two or three times per month. Usage would increase when the new facility in Elk Grove came to fruition. Sutter General Hospital stated they would use the facility at least once per month, at first, and usage of small spaces would most likely grow.

Elk Grove Unified School District

Our interviews with the Elk Grove Unified School District (EGUSD) indicate that, with over 70 facilities of their own, the district typically does not use off-site facilities. The only regular event that is held off-site are graduations, in which case facilities that can seat between 3,000 and 5,000 people are sought. On an annual basis, the school district may use a retreat space with capacity for 100 people. An example of this type of event is the District retreat for Administrative staff. These annual events are typically held at Cosumnes District Facilities. Though many of the current space needs are met, it was stated that EGUSD would like to work with the city directly if planning moves forward.

Frontier Communications

In the past Frontier Communications sought meeting space that could accommodate up to 100 people and also accommodate smaller meetings/breakouts from this large group. However, they have shifted to video conferencing for their regional retreats and no longer need off-site meeting space of this size. Currently, Frontier use in house meeting space for the 225 local employees for meetings, but this option is not optimal. It was noted that, if a space were available and easily accessible, Frontier Communications would likely use it for meetings as well as other relevant activities probably on a quarterly basis. Specifically, for smaller activities, a meeting room that would hold up to 30 people comfortably would be ideal. Catering facilities would be a must.

Local Competitive Environment

Based on our interviews with local venues, it is our understanding that the local event-rental market is strong and has generally grown over the course of the past few years. The economic downturn has

hurt business to some extent, but on the whole, the event market has remained robust. Certain private venues, such as Valley Hi Country Club, have continued to host close to 400 events per year, even in the economic downturn. However, it was noted that many events at this venue are booked by members and are related to golf events such as tournaments. Public facilities, such as the Laguna Town Hall have averaged approximately three events per month or about 40 events per year.

It was noted by the Recreation Supervisor for the Cosumnes Services District (CCSD) that the economic slowdown has mostly hurt the market for large events and that smaller events have been more typical in the past few years. Related to this point, most event rentals are for shorter periods of time, not the 12-hour “cash-cow-rentals” that have been the source of significant revenue in the past. This year, for example, rental revenue at the Barbara Wackford Community Center fell \$60,000 short of the 2009 budget. The case for creating a flexible, divisible space is therefore strong.

Historic utilization of facilities within the CCSD is shown below.

Table V-3: Percentage Utilization at the Cosumnes Community Service District Facilities

Facility	January - March 2006	January - March 2007	Difference
Pavilion Reception Hall	40.6%	87.3%	46.7%
Youth Center	44.3%	64.4%	20.1%
Castello Rec Center	93.8%	93.4%	-0.4%
Johnson Rec Center	93.8%	97.2%	3.4%
Laguna Town Hall KCHQ	47.7%	51.1%	3.4%
Laguna Town Hall- Reception Hall	72.2%	78.6%	6.4%
Laguna Town Hall-Rm#1	26.4%	27.5%	1.1%
Laguna Town Hall-Rm#2	74.6%	64.8%	-9.8%
Elk Grove Rec Center-Rm#1	98.4%	93.4%	-5.0%
Elk Grove Rec Center-Rm#2	93.8%	93.4%	-0.4%
Elk Grove Rec Center-Rm#3	93.8%	93.4%	-0.4%
Elk Grove Rec Center-Rm#9	52.5%	22.4%	-30.1%
Elk Grove Rec Center-Rm#10	25.4%	55.1%	29.7%
Wackford-Preschool	98.4%	93.4%	-5.0%
Wackford-Valley Oak Ballroom	34.5%	56.6%	22.1%
Wackford-Willow Room	34.4%	42.7%	8.3%
Wackford-Poppy Room (A&B)	58.6%	65.9%	7.3%
Wackford-Blue Heron	18.6%	19.4%	0.8%
Wackford-Teen Center	64.7%	61.0%	-3.7%
Wackford-Gymnasium	71.9%	84.8%	12.9%

Source: Cosumnes Community Service District

Comparable Public Assembly Facilities

The case studies detailed in this section were chosen based on the following criteria.

- Location within communities which are similar in size, demographic composition, and/or proximity to urban centers as the City of Elk Grove.
- City-operated centers that were constructed using mostly public funds and serve the local resident community.
- Offer multiple types of public programming within different event spaces and have outdoor parks, garden, and fields.
- Contain meeting and event space that is rented to the public and earns revenue to support operations.
- Were constructed within the past twenty years.

The information gathered for each facility included the size, construction cost, sources of funding, usage pattern and utilization, operating cost and revenue, and annual operating support required from the respective cities. A description of each facility is provided below.

The Diamond Bar Center, Diamond Bar, California



The Diamond Bar Center opened in March or 2004 and was designed by Gonzalez Goodale architects, based in Pasadena California. The development cost totaled \$12.5 million and was funded by a City issuance of \$12.5 million in lease-revenue bonds, which have a variable interest rate and a 10-year cap. In 2008, the city reviewed alternatives for financing the outstanding balance on the bonds, but concluded that the existing financing mechanism was still the best option. The City of Diamond Bar has retained ownership and management of the facility.

The community/senior center totals 22,500 square feet and contains a 500-seat banquet facility and a total of 14,000 square feet of meeting space. The 21,000-square-foot library is immediately adjacent

to the center, and the two facilities are linked by pedestrian walkways. The Center provides state-of-the-art multimedia capabilities and a full-catering kitchen. The schematic design emphasized natural materials (including stone, redwood, and copper roofing), the maximization of scenic views, and a blending with the surrounding natural landscape.

The facility is located amidst landscaped gardens, an attractive stream, a trail head, and various parks and ball-fields atop Summitridge Park; it is therefore considered to be a “pedestrian friendly” destination that has a strong focus on the outdoors. Located within Los Angeles County, near the borders with Orange, Riverside, and San Bernardino Counties, the facility has access to a large user-market. Often, financial groups with offices in all four counties will use the Diamond Bar Center for corporate functions because of its attractive location. However, it was stated that the majority of renters are from the local resident market. The Center offers residents a discounted rate. According to the manager, even when the guest-of-honor is not from Diamond Bar, usually the majority of guests are local residents.

On average, income from the rental of facilities accounts for approximately 60 percent of the facility's annual budget, with the City of Diamond Bar providing a subsidy equal to the remaining 40 percent of the budget. For example, the operating budget last year was \$900,000 and rental income provided \$600,000 in revenue.

The Diamond Bar Center hosts a number of weddings, high school formals, Quinceañaras, one or two-day meetings and conferences, and other types of private functions. These types of events provide the largest source of earned income although the facility charges a small fee for contracted classes, which are taught by private instructors. It was stated that their largest facility, the Grandview Ballroom, is booked for every Saturday through mid-2011, and even with the economic downturn, the facility has had very high utilization.

The Diamond Bar Center serves as the local senior center and therefore hosts weekly Bingo on Tuesdays and Fridays and a variety of arts and crafts and cultural events for the elderly community, including a holiday dinner and dance celebrations.

The rooms available for rent and their associated capacities and rental fees are shown in **Table V-4**.

Table V-4: Capacities, Rental Rates and Cleaning Fee at Diamond Bar Center

Room	Capacities		Weekday rates				Weekend rates				Cleaning Deposit	
	Dining	Theater	Residents		Non-resident/ All		Residents		Non-resident/ All			Other Governmental Agencies & Local Non-Profit Service Groups
			Business	All	Business	All	Business	All	Business	All		
Grand View Ballroom*	438	952	\$150/hr	\$200/hr	\$100/hr	\$2400 for a 6 hour rental, \$200 for each additional hour	\$3200 for a 6 hour rental, \$300 for each additional, hour	\$2400 for a 6 hour rental, \$200 for each additional hour	\$3200 for a 6 hour rental, \$300 for each additional, hour	\$1200 for a 6 hour rental \$100 for each additional hour	\$500	
Grand View Ballroom (2/3)*	288	724	\$100/hr	\$135/hr	\$67.50/hr	\$1800 for a 6 hour rental \$150 for each additional hour	\$2450 for a six hour rental, \$200 for each additional hour	\$1800 for a 6 hour rental \$150 for each additional hour	\$2450 for a six hour rental, \$200 for each additional hour	\$800 for a 6 hour rental \$75 for each additional hour	\$350	
Grand View Ballroom (1/3)	155	333	\$50/hr	\$55/hr	\$45/hr	N/A	N/A	N/A	N/A	N/A	\$100	
Grand View Ballroom (1/5)	53	114	\$30/hr	\$35/hr	\$27/hr	N/A	N/A	N/A	N/A	N/A	\$100	
Pine Room	66	120	\$50/hr	\$55/hr	\$45/hr	\$100/hr	\$110/hr	\$100/hr	\$110/hr	\$90/hr	\$100	
Sycamore Room (with patio)	60	128	\$50/hr	\$55/hr	\$45/hr	\$100/hr	\$110/hr	\$100/hr	\$110/hr	\$90/hr	\$100	
Oak Room (hardwood floors)	98	185	\$50/hr	\$55/hr	\$45/hr	\$100/hr	\$110/hr	\$100/hr	\$110/hr	\$90/hr	\$100	
Birch Room (10 computers)	N/A	N/A	\$50/hr	\$55/hr	\$45/hr	\$100/hr	\$110/hr	\$100/hr	\$110/hr	\$90/hr	\$100	
Maple Room	32	60	\$27/hr	\$30/hr	\$25/hr	\$55/hr	\$60/hr	\$55/hr	\$60/hr	\$50/hr	\$100	
Catering Kitchen	N/A	N/A	\$50/event	\$50/event	\$50	N/A	N/A	N/A	N/A	N/A	\$100	

*Rental of Entire Grand View Ballroom or 2/3 Grand View Ballroom includes catering kitchen, foyer and patio.
Source: Diamond Bar Center and ERA/AECOM

Torrance Cultural Arts Center, Torrance CA



The 80,000 square foot Torrance Cultural Arts Center (TCAC) was built as a partnership between select corporate donors, philanthropists, and the City of Torrance. Large corporate donors who provided support for elements of the center included Toyota Motor Sales USA, which was headquartered in Torrance at the time, Epson America, and Watts Homes. Approximately 50 percent of the remaining \$13 million in construction costs came from the City of Torrance, and the “town square” project, as it was then referred to, was launched in 1991.

The TCAC includes the 180-seat George Nakano Theatre/ banquet space, the 348-seat Armstrong Theatre, a recreation center, the 4,200 square foot meeting hall, a Japanese Garden, and the Festival Plaza. The Torrance Cultural Arts Center categorizes their facilities as theatre space, classroom space, and meeting/banquet room space.

When the project was initially developed, the Parks and Recreation department operated the facility and managed the programming. However, it has since been changed so that the Parks and Recreation department is still the facility manager and the landlord while the City’s General Services department manages the programming, with assistance from the Torrance Cultural Arts Center Foundation. The TCAC Foundation is best described by its mission statement, detailed below:

The Torrance Cultural Arts Center Foundation is a nonprofit organization of community and business leaders. Acting at the request of the Torrance City Council, we raise money to present shows that encourage the public's involvement with the Center and that enhance the reputation of Torrance as a balanced city.

The Foundation works to attract high quality entertainment and educational programming, specifically for the two large theater venues within the facility, while seeking to promote arts participation within the community. According to the senior manager of the TCAC, the model of sharing the programming responsibilities between the Foundation and the City’s General Services ensures that revenue-generating programming is balanced with community outreach and arts promotion.

Ninety-percent of the programming in the theatres is for non-profit performance groups, which pay low rental rates, subsidized by the City. Almost 100 percent of programming within the classroom space is for the Parks and Recreation Department, who also pay a subsidized rate. However, it was stated that by the sheer volume of classes and activities in the classrooms, the Center is able to generate a small profit from this type of rental. The meeting/banquet halls are almost exclusively rented to private users for wedding receptions, Quinceañeras, anniversary/birthday parties, and corporate events. However, it was noted that corporate business has essentially disappeared since the onset of the economic downturn in mid-2008. Base rental rates, as well as maximum seating capacities, for each space within the TCAC is shown in **Table V-5**.

The total operating budget for the TCAC is around \$2 million, though the City has been trying to scale the budget to \$1.7 million to accommodate budget cuts and financial constraints. Typically, earned revenue from rentals accounts for 50 percent of the operating budget and the City subsidizes the additional 50 percent of the budget from its General Fund. It was noted that if the TCAC did not have private rentals to provide operating revenue, it would be unsustainable and unable to continue operations. Fortunately, event rentals are looking very strong for the 2010 calendar after a small lull in business in 2009.

The TCAC has two full-service kitchens and a small warming kitchenette adjacent to the classroom area. Although they do not offer catering services, the facility can handle almost any type of outside catering need, and the senior manager stated that this offering is invaluable. Especially in the down economy, facility renters seek flexibility and are generally pleased when they can hire their own caterer or use the kitchen facilities for special needs. Nearby hotel properties, which are the major source of competition for event rentals, require that renters use the on-site catering services, and this has been a disincentive for some users. Moreover, the kitchen at the TCAC attracts cultural groups that prefer the TCAC over other facilities because they can provide ethnic meals to compliment their events. Although the TCAC is much older than the other case studies, it serves as an interesting example of how a structure has adapted its space and operating model to accommodate the changing needs of the local community.

Table V-5: Capacities and Rental Rates at the Torrance Cultural Center

	Rates ¹			
	Max Capacity	Resident Non-profit	Resident Private or Non-resident Non-Profit	Non-resident Private or Commercial
Toyota Meeting Hall	350			
Banquets, Wedding Receptions, Dances		\$680/ 8 hrs	\$776/ 8 hrs	\$1,460/ 8 hrs
Meetings, Seminars		\$340/ 4 hrs	\$388/ 4 hrs	\$730/ 4 hrs
James A Armstrong Theatre	504			
Theatre		\$350/ 5 hrs	\$840/ 5 hrs	\$1,540/ 5 hrs
Lobby Only		\$95/ 4 hrs	\$144/ 4 hrs	\$486/ 4 hrs
George Nakano Theatre	180			
Theatre		\$72.75/ hr	\$85/ hr	\$97/ hr
Lobby Only		\$29.75/ hr	\$36/ hr	\$42.25/ hr
Ken Miller Recreation Center	320			
Auditorium		\$72.75/ hr	\$85/ hr	\$97/ hr
Assembly Room		\$59.50/ hr	\$72/ hr	\$84.50/ hr
Pine Wind Japanese Garden	60			
		\$36/ hr	\$42.25/ hr	\$48.25/ hr
Torino Plaza	530			
		\$29.75/ hr	\$42.25/ hr	\$60.25/hr
Studio and Garden Rooms	55	\$29.75/ hr per room	\$36/ hr per room	\$42.25/ hr per room

¹ Additional charges, such as required event managers, set-up and break-down, kitchen use, and overtime not shown.

Source: Torrance Cultural Arts Center and AECOM

Shannon Community Center, Dublin



The Shannon Community Center totals 19,700 gross square feet and is located in the City of Dublin in Alameda County.

The facility re-opened in February 2009 after an approximately \$11 million renovation and reconstruction effort, lead by Sierra Construction Company, which replaced the older 13,000 square foot facility. The new structure has a 5,940 square foot banquet hall, which seats 300 for a sit-down dinner, staff areas, flexible meetings rooms, a catering kitchen, and two classroom spaces for a pre-school. Furthermore, the community center is located adjacent to Shannon Park, which has a playground, picnic and barbeque areas, and public art displays, as commissioned by the Dublin Fine Arts Foundation and the City. Capacities and rental information are shown in **Table V-6**.

The Center was designed to meet LEED Gold standards and incorporated highly efficient heating and air-conditioning, systems to reduce annual water consumption by 20 percent, and used natural, local, and sustainable resources. Approximately 50 percent of the funding came from the City's General Fund, 40 percent was from private funds, and 10 percent came from State of California Workforce Housing Grants.

According to City staff, it was important to build separate entrances for the preschool and the banquet hall in order to maintain privacy and security for both uses. The design of the building, shown in **Figure V-1**, is long and thin and separates many of the classroom spaces from the banquet hall, catering kitchen, and small conference room. The facility is fully booked on Saturdays for 2010, and Friday and Sunday bookings for 2010 are at approximately 50 percent. Most of the past and planned events are community functions, such as weddings and parties, and there have also been some business use as well, especially for City-related functions.

Table V-6: Capacities and Rental Rates at the Shannon Community Center

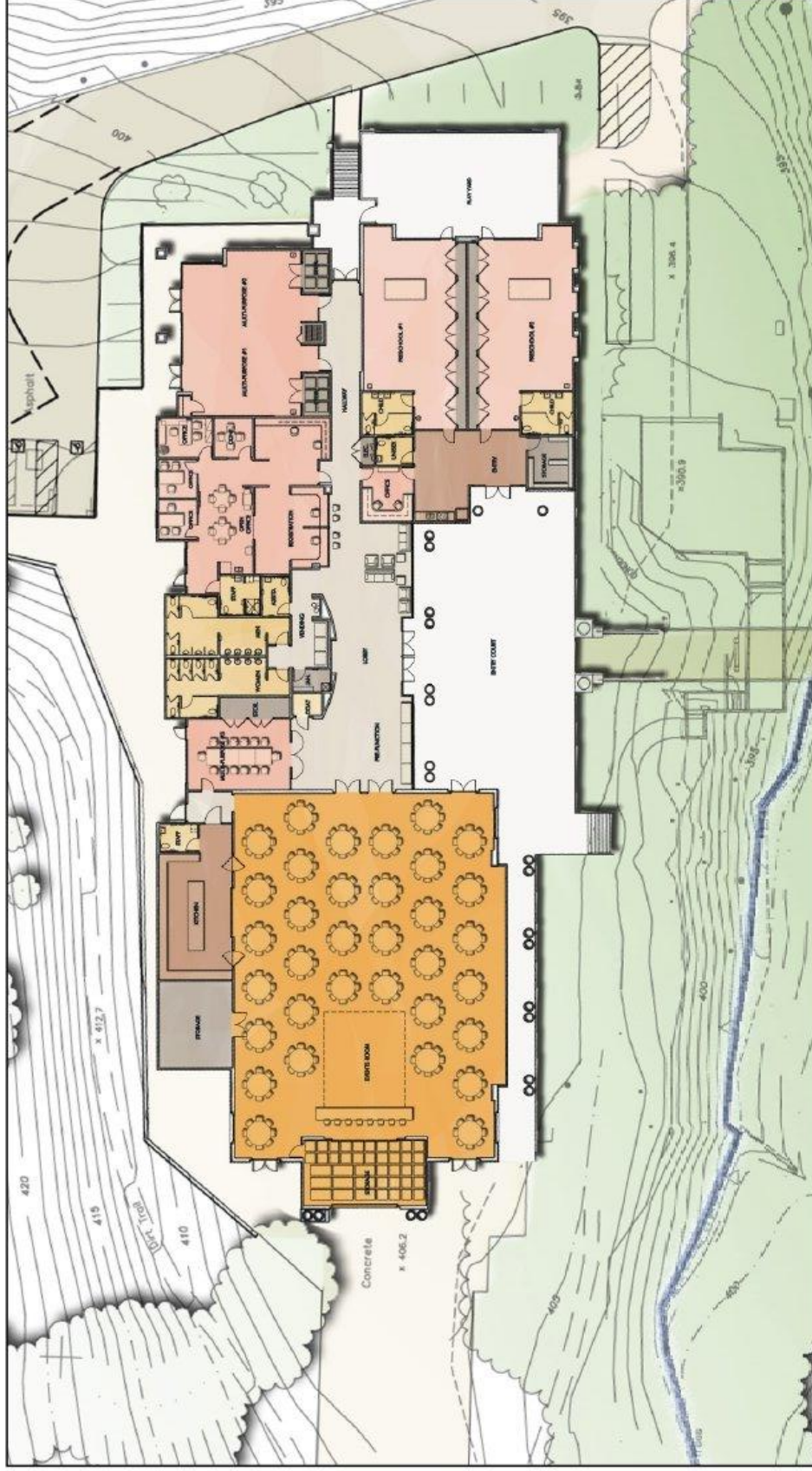
	Size (sqft)	Dining Assembly	Hourly Rates				
			Group 1 & 2 ¹		Group 3	Group 4	
			Evenings/Wknd	Fundraisers	Resident Non-Resident	Dublin based Non-Dublin based	
Ambrose Hall	5,940	300	400	\$188	\$250	\$300	\$400
Classroom	546	37	78	\$14	\$23	\$30	\$40
Multi-Purpose 1	640	41	87	\$24	\$53	\$70	\$93
Multi-Purpose 2	635	43	93				
Catering Kitchen	638	N/A	N/A				

Source: City of Dublin

¹ During business hours, Monday thru Friday from 8am to 5pm, the charge to these organizations is for set-up/takedown fee of \$14 per Facility Attendant only.
 Group 1: Public Agencies
 Group 2: Dublin Chamber of Commerce, Dublin-based Charitable and Social Welfare Organizations, Homeowners Associations and Sports Leagues
 Group 3: Individuals or Other Groups
 Group 4: Commercial Uses

Included in Rental of Ambrose Hall

Figure V-1: Master Plan for the Shannon Community Center, Dublin



Comparable Hotel and Conference Center Facilities

The following two case studies are examples of hotels and hotel-operated conference centers that mainly serve business clients in and around their respective market areas. The two examples provided are located within cities similar in population or population growth and are located outside of major metropolitan areas. The chosen examples represent models that could potentially be replicated in Elk Grove.

Austin Marriott North, Round Rock, Texas



The Austin Marriott North Hotel in Round Rock Texas is a hotel and conference center within the La Frontera development, a 328 acre mixed use project off of Highway 85. La Frontera, formerly the site of a dairy farm, broke ground in 1999 as a mixed-used commercial and residential project that sought to take advantage of its proximity to major regional employers. Located approximately 20 miles northeast of Austin, the 295-room hotel and conference center property totals eight stories and offers 14,905 square feet of flexible meeting space, including a 7,480 square foot ballroom with a seating capacity of 700, and 15 meeting rooms. The conference facilities serve as off-site meeting space for nearby businesses and corporations such as:

- Dell Corporate World Headquarters;
- State Farm Insurance Regional Headquarters;
- Abbott Labs;
- Farmer's Insurance;
- Hewlett Packard;
- Corridor Point Business Park (Michael Angelo's, Dell);

- Boardwalk (Wal-Mart/Home Depot retail center); and
- Round Rock Crossing (Target Power Center).

The hotel was developed by Winegardner and Hammons, Inc (WHI) who approached the City in 2007 with their model: “the prototype hotel designed and developed by WHI is a 263-room full-service hotel with 14,000 square feet of meeting space, eight executive boardrooms and a one-room food and beverage concept.” WHI seeks locations that are suburban but are close to corporate headquarters. The City also considered a bid from the John Q Hammons Company who, similar to WHI, manages 71 hotels and affiliated conference centers in the United States. The John Q Hammons Hotels and Resorts Company develops hotels in suburban sites that meet the following criteria:

- Are at least 10 acres and are visible from either a major interstate or thoroughfare.
- Close to a major capital city, a large university, an army base, or an industrial/business park that would generate business for the hotel/conference center.
- Is either given the land to develop or is offered an attractive financial incentive for purchasing the land.

The City decided to hire WHI primarily because of a non-compete clause within the proposed contract with John Q Hammons that would have prevented another hotel or conference center from developing within the city.

The meeting facilities at the Marriott are mainly oriented towards the business community and are used as off-site facilities for Dell. Moreover, many week-day guests are visitors who are affiliated with Dell or another corporation within the region. The event space is relatively small and cannot handle large-scale conferences. The break-out rooms are few and are very small, but they adequately meet the demand for small corporate meetings and conferences. It was stated that approximately 85 percent of the event space is used for business purposes and 15 percent of use is from the local community, who hold weddings, banquets, and other events at the hotel. There are no other adequate event spaces in the region, and therefore the Marriott is coveted by the community, especially on weekends. It is worth noting that the University of Texas contracts with the Marriott Hotel at La Frontera for visiting teams. Therefore, during football season, many of the weekend hotel room sales are to football players and fans.

The meeting spaces are detailed in **Table V-7**.

Table V-7: Sizes and Capacities at Marriott Austin North Conference Center

Meeting Room	Dimensions		Area Sq. Feet	Capacity by Floor Set-Up					
	LxWxH	Sq. Feet		Theater	Schoolroom	Conference	UShape	Reception	Banquet
La Frontera Ballroom	136x55x14	7,480	600	480				700	600
La Frontera I	22x26x11	572	45	40		20	20	45	40
La Frontera II	22x29x11	638	45	40		22	20	45	40
La Frontera III	45x55x14	2,475	180	150		50	50	180	180
La Frontera IV	45x55x14	2,475	180	150		50	50	180	180
La Frontera V	24x26x11	624	45	40		20	20	50	40
La Frontera VI	24x29x11	696	50	40		22	20	50	40
Austin Meeting Room	35x24x10	1,049	70	40		30	30	70	60
Williamson Executive Boardroom	26x17x8	454				14			
Travis Executive Boardroom	26x17x8	454				14			
Lee Executive Boardroom	27x17x9	578				14			
Milam Executive Boardroom	27x17x9	578				14			
Bell Executive Boardroom	27x17x9	578				14			
Burnet Executive Boardroom	27x17x9	578				14			
Blanco Executive Boardroom	27x17x9	578				14			
Bastrop Executive Boardroom	27x17x9	578				14			
Atrium Terrace	44x44x25	2,000							
Total		22,385	1,215	980		326	210	1,320	1,180

Source: Marriott Austin North

The Hyatt Vineyard Creek Hotel and Spa, Santa Rosa, California



The Hyatt Vineyard Creek Hotel, Spa, and Conference Center is a 155-room property located within Santa Rosa in Historic Railroad Square. The Conference Center at the Hyatt includes roughly 40,000 square feet of function space of which 18,000 square feet is indoor meeting facilities and 22,000 square feet is for outdoor events. **Table V-8** illustrates the capacities and sizes of event space. Additionally, the property includes a 10 room spa.

The development of the hotel-conference center in Santa Rosa was conceived long before it was realized. The City and Redevelopment Agency (RDA) assembled the eight-acre property through multiple lot purchases. The largest lot was purchased from the Grace Brothers Brewery. The property was always intended to be developed into a hotel and conference center, but during the interim ten years between the land-purchase and development, there were initiatives to develop affordable housing projects and a homeless shelter. By the time negotiations began in 1998 with the developer, Norm Rosenblatt, the RDA owned the entire parcel. The terms of the negotiations between Rosenblatt and the RDA included a provision for the RDA to retain ownership of the land and the proposed conference center.

Total investment for the hotel and conference center was about \$27 million, not including the roughly one million dollar of City investment into the site remediation. The total development cost was partially financed by the RDA, who provided about \$12.2 million in loans to Rosenblatt's group. The RDA still owns both the land and the conference center. The Hyatt pays an annual base rent of \$100,000 to the RDA, and when revenues hit a certain point, there is an additional participation rent which varies with revenues. The threshold was first hit in 2007 and then again in 2008. The RDA expects that 2009 revenues will be below the threshold, and if so, only the base rent will be due. The Noble Organization out of Atlanta owns the hotel as of early 2007, and they have an indefinite option to purchase both the land and conference center.

According to the General Manager at the Hyatt, about 40 percent of business at the conference center is from the corporate market. Events booked by associations and government entities

comprise another 40 percent of business. The remaining 20 percent of use is for community events such as, proms, sporting banquets, birthday and anniversary parties, etc. About 30 percent of all clients come from within Sonoma County and about 80 percent of clients are from within North-Central California, including Sacramento. (Clients from government entities are considered Sacramento-based, even though conference attendees may come from a range of areas).

Since the Hyatt took over operations in 2004, the hotel has performed much better. Under Rosenblatt, the annual occupancy was between 35 and 45 percent. The occupancy rate averaged 75 percent during the three years prior to the current economic downturn, when the average daily rate (ADR) was approximately \$155. Even amidst the downturn, peak season occupancy rates were in the 90s with business is still strong. He attributes this to the large and efficient marketing budget of Hyatt Corporation and to the diversity of guests. Approximately 85 percent of guests are from outside of Sonoma County. Visitors come to the hotel to visit the vineyards, visit families (especially during the holidays), and for business purposes.

A notable asset to the hotel is the Prince Memorial Greenway, which is adjacent to the Hyatt property. This redevelopment project aimed to restore the natural habitat of the creek, which had been channelized using concrete in the 1960s to prevent flooding. The \$19 million investment was funded by a combination of public money including grants from the US Army Corps of Engineers and a private donation from the Prince family. The project converted the creek into a 0.6 mile trail, which traverses plazas and public art displays and connects the Historic Railroad District with the downtown core. This has been an invaluable asset to the Hyatt property and has proved to be a major attraction for Santa Rosa in general.

A summary table for the information presented above is shown in **Table V-9**.

Table V-8: Sizes and Capacities at Hyatt Vineyard Creek Conference Center

Room Name	Square Feet	Capacities						
		Banquet	Reception	Theater	Classroom	Boardroom	U-Shape	
Alexander Valley Ballroom	6,944	550	750	600	340	150	180	
Alexander Valley I	2,296	180	250	200	100	50	62	
Alexander Valley II	2,296	180	250	200	100	50	62	
Alexander Valley III	1,148	80	125	100	60	25	25	
Alexander Valley IV	1,148	80	125	100	60	25	25	
Alexander Valley V	4,592	350	500	400	200	75	120	
Alexander Valley Foyer	2,604	80	400	—	—	—	—	
Dry Creek Valley Ballroom	2,204	180	250	180	140	50	40	
Dry Creek Valley I	1,102	70	125	90	60	25	25	
Dry Creek Valley II	1,102	70	125	90	60	25	25	
Dry Creek Valley Foyer	1,840	40	200	—	—	—	—	
Sonoma Mountain	880	60	60	60	32	22	20	
Chalk Hill	858	60	60	60	32	22	20	
Russian River Valley Ballroom	1,664	100	100	120	80	36	35	
Russian River Valley I	676	40	40	50	24	18	16	
Russian River Valley II	988	60	60	70	40	24	24	
Green Valley Boardroom	546	—	—	—	—	16	—	
Total	17,540							
Outdoor Event Area								
Sonoma Valley Courtyard	5,625	250	500	160	200	—	—	
Sonoma Valley Garden	8,100	400	600	450	—	—	—	
Knights Valley Garden	4,950	250	400	300	—	—	—	
Carmos Garden	3,000	150	300	200	—	—	—	
Spa Garden	450	20	300	20	—	—	—	
Total	22,125							

Source: Hyatt Vineyard Creek

Table V-9: Summary of Key Operating Statistics from Case Studies

Name	Year Built	Total Cost	Source of Funding	Total Gross SF	Operating Budget (2008)	Cost/sq	Annual Revenue (2008)	City Funding	% Earned Revenue	Utilization
Diamond Bar Center	2004	\$12.5 M	City Bond	22,500	\$900,000	\$40	\$600,000	\$300,000	67%	70% community ¹ 30% business
Shannon Community Center	2008/9	\$11 M	City, Private, CA Workforce Grant	19,700	\$460,000	\$23	N/A	N/A	N/A	~80% Community 20% Business
Torrance Cultural Arts Center	1991	\$13 M	City, Corporate	78,000	\$2,000,000	\$26	~\$1,000,000	~\$1,000,000	50%	85% community 15% business
Austin Marriott North	2001	~\$25 M	Private	14,905	N/A	N/A	N/A	N/A	N/A	15% community 85% business
Hyatt Vineyard Creek	2002	\$27 M	Private, Redevelopment	39,665	N/A	N/A	N/A	N/A	N/A	20% community 80% business

¹ Community refers to social events whereas business includes all corporate, public and/or on-profit organizations that use the facility for business purposes
Source: Individual Facilities

Recommendations for Public Assembly Facilities

The Public Assembly component of the proposed Elk Grove Civic Center is expected to meet civic demands for event space while serving as an interim venue for many local organizations, businesses, and community groups who will hold meetings and business-related events in the new facility. Other facilities within the proposed Civic Center will certainly meet some need for gathering space, but there is a clear need for a community center that serves as an event venue; a more business-oriented conference center should be considered for later phases and will be further discussed in Section VII. Given the expected growth in population, strong demand from the local event market, and a lack of adequate facilities within Elk Grove, we recommend the following features for the Community Center.

- A facility with a gross square footage of between 25,000 and 35,000.
- An accessible outside space that is well-landscaped and accommodating for private, outdoor events.
- A main ballroom/event space totaling between 5,500 and 7,000 square feet and can accommodate up to 350 people for a dinner/banquet. This main room should have floor-to-ceiling windings that offer scenic views, access to the outdoors, and an overall elegant setting for formal events.
- A full-catering kitchen that is easily accessible to the main room.
- A series of classrooms that serve as break-out rooms for business events and teaching spaces for educational purposes.
- A large and elegant lobby.

In designing the community center, it will be important to separate the main ballroom from some of the other community facilities, such as the classrooms or potential art studios. It may be useful to consider separate entrances for the main ballroom and the rooms. This will allow the facility to host a large private function, such as a wedding or an annual business dinner, without interference from other, smaller events. This will maximize building efficiency and earned income potential from event rentals, as large events will not preclude smaller, community events occurring simultaneously.

VI. Market Assessment for Public Recreational Facilities

ERA has conducted a market assessment of the following public recreational facility uses:

- Recreational Parks (local and regional)
- Fitness Centers
- Aquatic Centers

In this section we outline the particular methodologies and present our analysis of potential, key findings, and recommendations. Further detailed analysis is shown for uses for which our research indicated strong market demand.

Recreational Parks- Local

To assess the potential demand for a new recreational park (local), ERA interviewed Cosumnes Community Service District (CSD) Parks and Recreation Department staff. The CSD provides parks and recreation services to the cities of Elk Grove and Galt. Additionally, ERA researched comparable local recreational parks covering site visits, development costs, utilization patterns and operations of comparable regional recreational sports complexes. Furthermore, data from the National Sporting Goods Association (NSGA) was reviewed.

Local Comparable Recreational Parks

Based on our research, the local sports and recreation market is strong. There are approximately 92 parks within the CSD. Parks range from small pocket parks to larger multi-use recreational parks. According to the CSD, approximately half of the parks are used for sports activities.

Through site visits and research of local parks, ERA narrowed the inventory of parks to those that would be most comparable to the proposed project and sought larger, more programmed facilities. Selected parks are shown in **Table VI-1**.

Table VI-1: Selected Local Comparable Recreational Parks

Name	Year Opened	Acres
Bartholomew Sports Park	Under Construction	46.0
Betschart Park	1992	12.7
Derr-Okamoto Community Park	Under Construction	21.0
Elk Grove Park	1970	127.0
Hill Park	1993	7.5
Johnson Park	Phase I (8 acres) 1997	21.0
Jones Park	2003	17.2
Kloss Park	1990	17.0
Laguna Community Park	2002	16.0
Morse Park	Phase 1 & 2 are open for use	27.0
Nottoli Park	2003	21.1
Rau Park	Original park 2005; Additions in 2007	18.0
Zehnder Park	1993	9.5

Source: Cosumnes Community Service District (CSD), Individual Facilities, ERA AECOM

The selected local parks range in size from 7.5 to 127 acres and opened between 1970 and 2005. Currently, within the CSD, there are four parks under construction. The majority of the selected local parks have play equipment, picnic areas, shade structures, swings and restrooms while approximately half of the selected parks include soccer, softball and youth baseball fields. Volleyball, tennis, and basketball courts, pool or water-play and dog parks are lacking at the selected parks. While these parks may vary in terms of the amenities offered, it is noted that they are all well manicured and maintained by the CSD Parks and Recreation Department.

A major competitor to the proposed project is the Bartholomew Sports Park which is currently under construction. When completed, this park will span 46 acres and will include four lighted soccer/football fields, three to four lighted softball/baseball fields, four tennis courts, shade structures, playground equipment, restrooms, a parking lot for 480 vehicles and a concession building. With the addition of this new park, demand for revenue producing sports fields such as baseball, soccer and lacrosse will be satisfied in the short to intermediate term.

Selected comparable parks and their amenities are detailed in **Table VI-2** while their locations are shown in **Figure VI-1**. Based on the pipeline of parks under construction in the Elk Grove area, coupled with conversations with CSD and an analysis of the current utilization, we conclude that the current and future supply of recreational parks will satisfy demand from the local community. However, an indoor gymnasium may be supported within the new proposed development, as this amenity is lacking in the recreational parks surveyed.

Table VI-2: Selected Details of Local Recreational Parks

Name	Play Equipment	Picnic Area/Tables	Barbeque	Shade Structure	Restrooms	Joggin/Bike Trail	Swings	Horse Shoe Pits	Volleyball	Tennis Courts	Basketball	Soccer Field	Softball Field	Youth Baseball	Babe Ruth Baseball	Pool or Waterplay	Dog Park	Parking Lot
Bartholomew Sports Park (U)	X	X		X	X					L		L	L	X	L			X
Betschart Park	X	X	X	X	X	X	X					X	X					
Derr-Okamoto Community Park (U)	X	X									X			X	X			
Elk Grove Park	X	X	X		X	X	X	X	X			X	L	X	X	X	X	X
Hill Park	X	X	X		X	X	X							X				X
Johnson Park	X	X		X	X		X			X		X	X	X				X
Jones Park	X	X	X	X	X		X			X	X				X			X
Kloss Park	X	X	X	X	X	X	X	X				X		X				
Laguna Community Park	X	X		X	X	X						L	L			X	X	X
Morse Park	X	X	X	X	X	X	X	X			X	X		X		W	X	X
Nottoli Park	X	X		X	X	X	X					L	X		L			X
Rau Park	X	X		X	X		X				X	X		X				X
Zehnder Park	X	X		X	X							X	X		X			

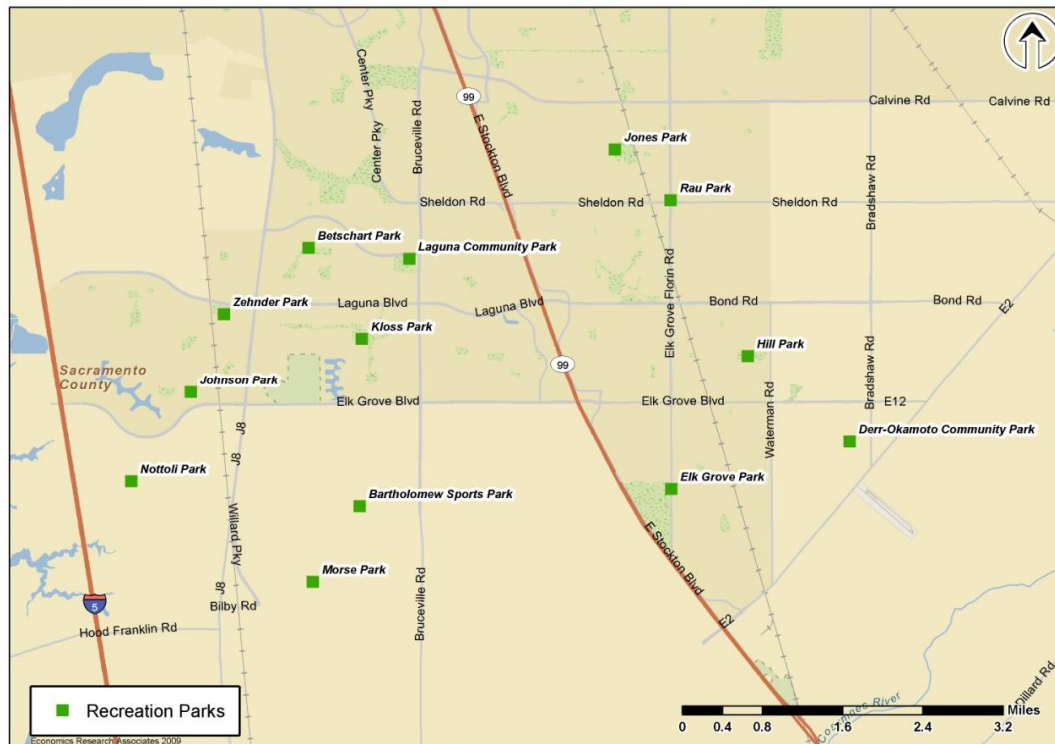
(U): Under Construction
 L: Lighted
 W: Waterplay

Local Park Key Findings

The following are key finding and recommendations for the recreational parks within Elk Grove:

- There is a strong youth demographic to support the leagues which play at the local recreational parks
- All of the facilities are in good to excellent shape
- Strong competition with new Bartholomew Sports Park and will absorb current demand in the immediate / short term
- With the addition of the new Bartholomew Sports Park, revenue producing sports fields such as baseball, soccer and lacrosse are meeting the short term demand
- There is a lack of indoor gymnasiums (basketball, volleyball, etc.) throughout the CSD and a potential for a need for additional inventory
- The inventory of parks are spread throughout the CSD, which makes it difficult to host major revenue producing tournaments

Figure VI-1: Local Comparable Recreational Parks



Regional Comparable Recreation Parks

The current demand for local participation at the parks is (or will be with the additional inventory about to open) met, there is potential for a regional complex to be constructed in the Elk Grove area. As noted in the previous section, with parks spread out throughout Elk Grove, it is very difficult to operate high-end tournaments. As part of the scope, we analyzed the potential for a sports complex to host regional sporting events that bring in participants from throughout the Northern California region.

As described within this section, these complexes are not revenue drivers or their own. Many of these facilities break-even financially, or operate at a small operating loss. These facilities can have major economic impacts within the area from the large amount of off-site spending (restaurants, hotels, etc.). In order to operate at or about break-even, these facilities need to be utilized by the local community during the week. These facilities are typically utilized by local 'club' teams.

We have reviewed a few of these facilities in case study format. The case studies of these California facilities were chosen based on the following criteria:

- Location and proximity to major cities
- Type of sports uses
- Regular team use and tournament user patterns

- Constructed in the past ten to twenty years

The information gathered for each facility included the size, construction cost, sources of funding, usage pattern and utilization, operating cost and revenue, and annual operating support required from the respective cities. A description of each facility is provided below.

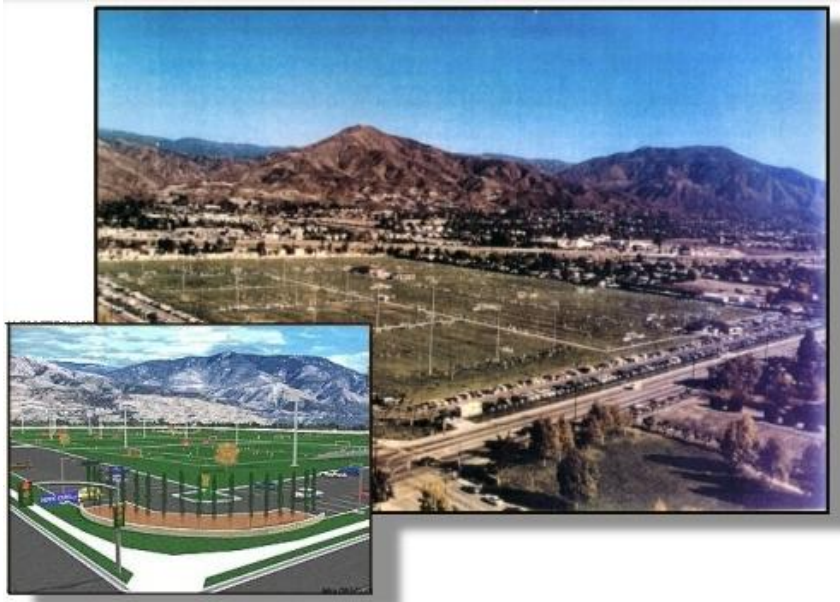
John Blanche Memorial Soccer Complex, Temecula, California



The John Blanche Memorial Soccer Complex is a 50 acre outdoor soccer and lacrosse facility. The fields are used by both youth and adult leagues with the majority of the users being residents. While the fields are primarily used for soccer, they can be rented for football or lacrosse use. The soccer complex is open year round except when seeding takes place. Within the complex, there is a snack bar which is opened during tournaments only.

John Blanche Memorial Soccer Complex is home to the Arsenal Football Club and hosts all of the Arsenal Football tournaments, Arsenal FC tournaments, College Showcases, Far West Regional League, Cal South State and National Cup fixtures.

San Bernardino Soccer Complex, San Bernardino, California



The San Bernardino Soccer Complex was built in 1997 and includes 17 fields; five of them are lighted. The soccer complex serves six Cal South clubs including Celtic, and Arsenal and the United States Youth Soccer Association national champions,. The landscaped Complex also provides:

- 1,600 paved parking spaces
- Two concession stands
- Administrative offices
- Playground
- Two restroom buildings

The adjacent San Geronio High School provides stadium seating for 2,500 spectators, lockers, showers, meeting rooms, ancillary paved parking and swimming pools. Two additional full-sized fields are planned for immediately south of the complex.

The nearby San Bernardino Blast Complex offers six additional lighted fields. Located next to the Little League Regional Headquarters, the Blast Complex offers a 40-room dormitory which can be rented at a very low cost. California State University at San Bernardino complements the youth soccer program with its own Division II college soccer program and additional playing fields. Together, these facilities and programs provide a synergy that cannot be duplicated easily.

Lancaster National Soccer Center, Lancaster, California



The Lancaster National Soccer Center provides a venue for youth, adult, amateur and pro league games, tournaments, exhibitions, special events, summer camps, and training sessions. The 14 million dollar complex is designed exclusively for soccer and is served by professional staff that includes grounds maintenance, traffic control, food service, first aid, security and other support services. The complex includes:

- 160 acres with 34 playing fields
- 27 acres of parking for 2,800 autos and RVs
- Five FIFA prescription turf fields
- 6,000 square foot activity building with referee's room, exhibition hall, meeting rooms, storage, rest rooms and concession outlets
- Seven full restroom facilities and two concession facilities
- Children's amusement facilities
- Lighted fields for night play
- Tournament office and official's lounge
- Shaded spectator berms
- Professional city grounds crew on duty during all tournament games for maintenance, security, first aid and recreational support services

This example demonstrates the revenue opportunities related to soccer-oriented and lacrosse sports facilities and the engagement by public agencies in supplying them.

Summary of Regional Comparable Recreational Parks

A summary of general information from the selected regional sports complexes is shown in **Table VI-3**.

Table VI-3: Summary of Selected Regional Sports Complexes

	John Blanche Memorial Soccer Complex	San Bernardino Soccer Complex	Lancaster National Soccer Center
Location	Temucula, CA	San Bernardino, CA	Lancaster, CA
Year Opened	2001	1997	1998
Acreage	42	44	160
No. of Fields Regulation Fields Small Fields for Children	19 to 21 fields, depending on layout 19 Can be sectioned into smaller fields	17 fields. Plans to add 2 more fields 17 Can be sectioned into smaller fields	34 24 regulation; 5 FIFA 10
No. of Field with Night Lighting	No	5	11
No. of Parking Spaces	2,000	1,600+	2,800
Primary Building	No	2 buildings of 8,000 SF each with community room, storage and restrooms. One of the buildings houses the administrative offices.	6,000 square foot activity building with referee's room, exhibition hall and meeting room, storage, rest rooms and concession outlets
Spectator Field - Seating Capacity	No	In planning - adjacent high school has agreement to provide spectator seating for 2,500 with shower facilities in exchange for free use of fields	In planning
F&B/Retail Facilities	Snack bar opened during tournaments only; concessions in a specific area	2 permanent snack bars plus concessions	2 snack bars plus mobile units between fields
Other Sports Facilities	Can be rented for football, but reserved for soccer mainly to preserve quality of grass	Occasionally used for ultimate frisbee, lacross, No cross-country and cricket	No
Picnic Area (SF)	27000 SF	3,000 SF with 15 tables. Additional space on south side with 5 tables, patio and playground	No
Comments	Lack of night lighting is a problem	Not enough parking spaces	

Source: Individual Facilities, ERA/AECOM

Development Costs

Development costs of the regional selected comparable sports facilities range from \$750,000 to \$21 million as shown in **Table VI-4**. Funding for these sports complexes varies from private sources, redevelopment agencies, grants and city subsidies. Owners and operators of these types of parks can be either a private party, private contractors that represent the city, or through the city itself.

User Patterns

User patterns of the regional sports facilities are presented in **Table VI-5**. Typically the number of participants range from approximately 20 to 100 teams for regular use. Tournaments, which typically run throughout the weekend, can capture approximately 10 to 250 teams per tournament.

The type of user ranges significantly from the different selected facilities, probably due to the tournament organizer. Within the selected facilities, team-organized tournaments are more popular than operator-organized tournaments.

Operations

Operating expenses for sporting facilities of comparable size can range from approximately \$200,000 to \$1 million per year. Within the facilities listed in **Table VI-6**, the John Blanche Memorial Soccer Complex and the San Bernardino Soccer Complex do not receive subsidy from their respective cities, but the Lancaster National Soccer Center receives state and federal grants in addition to city support. Corporate sponsorships, either for the facility or for tournaments, are also revenue sources for these types of facilities.

Table VI-4: Development Costs of Selected Comparable Sports Facilities

	John Blanche Memorial Soccer Complex	San Bernardino Soccer Complex	Lancaster National Soccer Center
Location	Temucula, CA	San Bernardino, CA	Lancaster, CA
Year Opened	2001	1997	1998
Development Costs	\$750,000	Developed by Calsouth Foundation	\$21 million
Funding	Donation from Southwest Traders	Loans from San Bernardino Redevelopment Agency	Grants, city subsidies
Owner	Southwest Traders	City	City
Operator/Manager	Southwest Soccer Club	Private contractors that represent the city	City

Source: Individual Facilities, ERA/AECOM

Table VI-5: User Patterns of Selected Comparable Sports Facilities

	John Blanche Memorial Soccer Complex	San Bernadino Soccer Complex	Lancaster National Soccer Center
Location	Temucula, CA	San Bernadino, CA	Lancaster, CA
Months in Use	Open all year round except when closed for seeding	All year round	All year round
No. of Participants	26 teams of 850 people	Not intended for regular team use; except for the high school that has an agreement to share facilities. They use the facility for practice on a seasonal basis.	Varies - 100 teams
Major Users by Type			
Youth	59%	NA	Mostly
Adult	41%	NA	
Major Users by Origin			
Residents	90%	NA	60%
Non-Residents	10%	NA	40%
Usage by Leagues	26 teams	NA	5
Field/Team Rental	\$25 per game	NA	\$10 per player
User Patterns- Tournaments			
No. of Tournaments per Year	10	40 (weekends)	20
Orientation of Tournaments			
Operator-Organized	3	-	-
Team-Organized	7	40	20
Time	Throughout the year	Throughout the year	Throughout the year
Length of Events	One weekend	Weekends	Weekends
No. of Teams per Tournament	Varies from 50-200	Varies from 40 to 250	Varies from 10 to 200 teams
User/Entry Fees	\$300-\$395 per team plus misc fees such as referee fees, medals, etc	\$3,500 for 2 day tournaments on 17 fields; \$5,250 for 3 day tournaments; \$25 per game per field for league play; plus misc. fees	Free for teams with agreement/grants; Charge varies for others ranging from \$9 to \$14 per hour per field

Source: Individual Facilities, ERA/AECOM

Table VI-6: Operations of Selected Comparable Sports Facilities

	John Blanche Memorial Soccer Complex	San Bernardino Soccer Complex	Lancaster National Soccer Center
Location	Temucula, CA	San Bernardino, CA	Lancaster, CA
Operating Revenues		\$450,000 including grants and sponsorships	\$250,000 - 300,000
Operating Expenses	\$200,000 for maintenance	\$450,000 per year	\$787,000 per year
Profitability	Breaks even	Breaks even	Not intended to be profitable but to attract tourism - projected annual economic development to city at \$3 to \$3.5 million
Subsidy from the City	No	Redevelopment loan	State and federal grants plus City operating subsidy
Corporate Sponsorships	Yes	Yes	Tournaments only and individual sponsorships; finalizing a naming rights agreement
Sports Association Affiliation	Southwest Soccer Club	In conversation with CalSouth to get reaffiliated	CalSouth

Source: Individual Facilities, ERA AECOM

As previously described in this section, these complexes are not revenue drivers or their own. Many of these facilities break-even financially, or operate at a small operating loss. These facilities can have major economic impacts within the area from the large amount of off-site spending (restaurants, hotels, etc.). In order to operate at or about break-even, these facilities need to be utilized by the local community during the week. These facilities are typically utilized by local 'club' teams.

Key Findings

Currently (and especially with the parks under construction) there is sufficient outdoor park and recreation inventory for the immediate and short-term to satisfy the local demand. As the population grows over the next 10 to 25 years, other parks will need to be added to the CSD landscape to meet local demand.

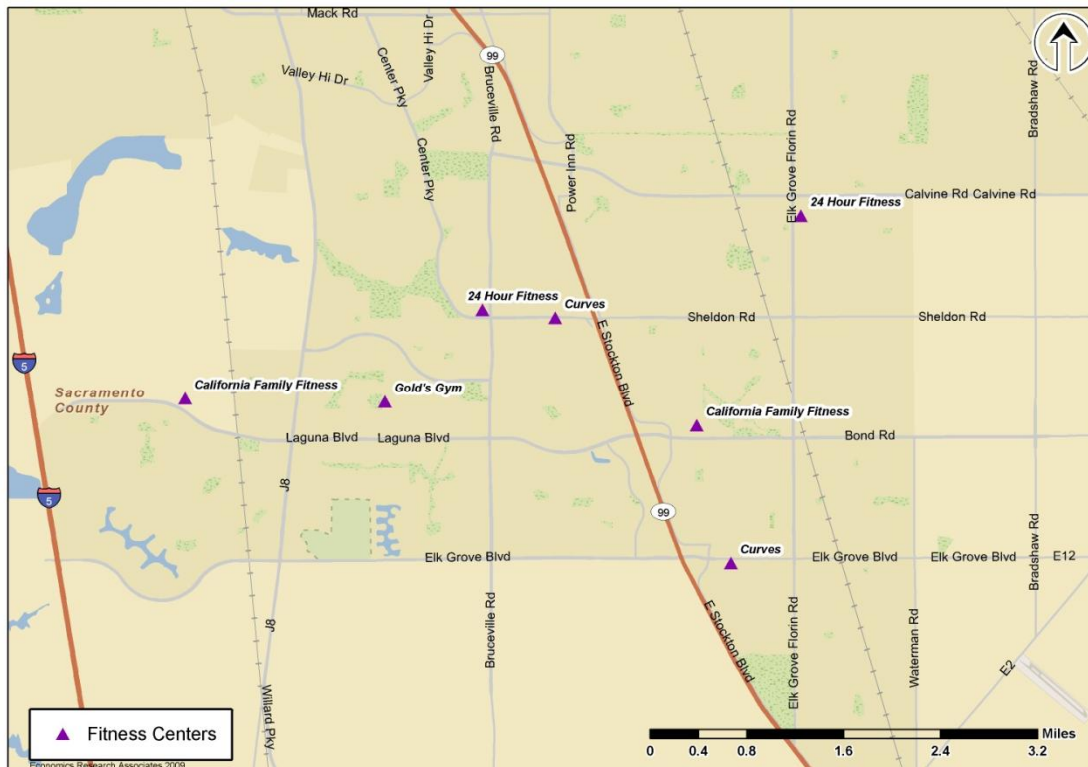
With all of the parks located throughout the area, there is not a facility to host high-end tournaments. A large facility to host soccer, lacrosse, football, etc. tournaments at one complex has the potential to be an economic benefit to Elk Grove. Many of these tournaments are on weekends and teams travel from throughout the region, stay in the local hotels and eat in Elk Grove restaurants, creating an economic impact to the area.

Fitness Centers

To assess the potential demand for a new fitness center, we interviewed CSD parks and recreation department staff and researched the current supply within the market. Currently there are approximately seven major fitness centers in Elk Grove. These fitness centers are shown in **Figure VI-2** below and include:

- California Family Fitness
- 24 Hour Fitness
- Gold's Gym
- Curves

Figure VI-2: Location of Local Comparable Fitness Centers



Current supply includes gyms for families, co-ed gyms and gyms specifically for women. In addition to the brand name fitness centers, residential communities with Homeowners Association (HOA) community centers include fitness and pool areas for residents to use which is additional supply to the market.

ERA AECOM has concluded that there is not a sufficient amount of demand for additional fitness centers due to the amount currently within the market and the type of existing supply.

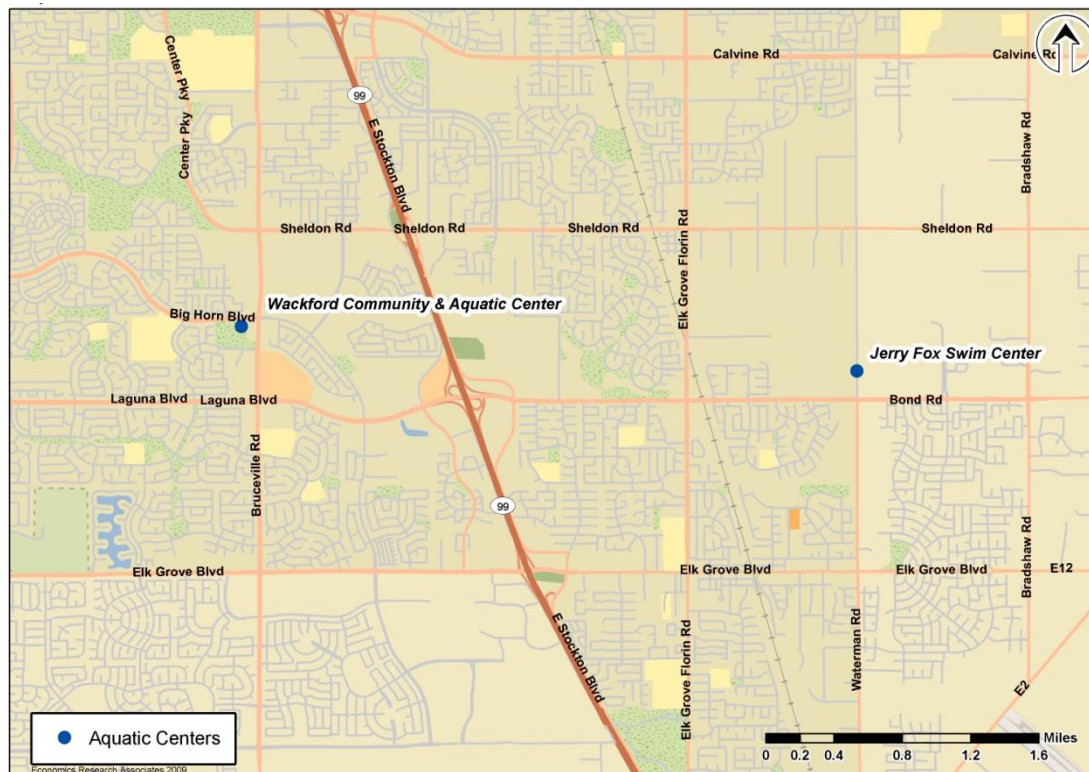
Aquatic Centers

We interviewed personnel at the Wackford Community and Aquatic Center to assess the potential demand for additional aquatic centers within Elk Grove. Research of the current supply is presented below. Under the Cosumnes Community Services District (CSD) there are two pool facilities:

- **Wackford Aquatic Center** - The Wackford Aquatic Center is open year-round for adult lap swim and water aerobics and open seasonally for recreational swim. Attendance was approximately 55,000 in 2009.

- **Jerry Fox Swim Center** - Jerry Fox Swim Center is open seasonally to the public and is smaller than the Wackford Aquatic Center with a pool and small water slide. There were approximately 5,000 visitors last year.

Figure VI-3: Location of Local Comparable Aquatic Centers



In addition to the two aquatic centers within Elk Grove there are two HOA pools in residential communities and three fitness clubs with pools located in their facilities.

Through interviews and research of aquatics centers within the market, ERA AECOM has concluded that there is potential for an additional aquatic center within the area.

Public Recreational Facilities Recommendations

Within a short term time frame, an aquatic center and an indoor gymnasium could be justified for the project based on conversations with the CSD and an analysis of the current utilization. An aquatic center ranging in size from approximately three to five acres and an indoor gymnasium approximately 25,000 square feet with 14,000 to 15,000 square feet of courts are potential parameters.

Additionally, longer term recommendations include additional sports fields with the potential to range from 20 to 40 acres. As mentioned earlier, it should be noted that sports fields of this magnitude need to be utilized by local residents in addition to tournament play from non-residents. A major

tournament facility for sports such as soccer and lacrosse would not generate a profit but could have a positive economic impact to Elk Grove in terms of support for lower price-point hotels and restaurants. Finally, through the analysis of fitness centers, ERA AECOM does not recommend adding additional fitness center facilities to the market given the current supply.

VII. Commercial Development Opportunities

With the public facilities and community investment creating a new Civic Center, the City of Elk Grove has the opportunity to integrate some commercial development into this complex to both provide services and to generate revenue. This report section evaluates the potential for commercial development to be integrated within and supportive of the Civic Center.

Retail and Restaurant Strategy

Successful retail development is dependent upon four basic factors: 1) market area population and income growth, 2) location to facilitate market access, 3) concentration or agglomeration, and 4) strength and location of competition. The Civic Center site will be evaluated against each of these four factors.

Market Growth

Elk Grove clearly enjoys a growing retail market. Sacramento County's taxable retail store sales have nearly doubled from \$7.6 billion in 1995 to \$14.3 billion in 2007 (see **Table VII-1**). Until recently, retail store sales per county resident has also climbed from about \$7,900 to around \$12,000; however, the recent recession has brought this number back down a few percentage points (**Table VII-2**).

Within Elk Grove, taxable retail sales have also grown from \$346 million in FY2001 (first full year after incorporation) to \$1.57 billion in FY2006. Since that year, taxable sales have fallen steadily to \$1.32 billion for FY2009 with the decline from 2008 to 2009 being a precipitous 15.7 percent (**Table VII-3** and **Table VII-4**).

The occupied retail space trend also indicates strong long-term growth. As shown in **Table VII-5**, from second quarter 1999 to second quarter 2009, occupied retail space in the county climbed from 57.2 million square feet to 61.7 million square feet; this represents a net average annual absorption of 450,000 square feet. Over the same period, the occupied retail space within Elk Grove increased from 2.92 million to 4.86 million square feet. The average net absorption in the city was 194,000 square feet per year (**Table VII-6**). During this past decade, 43 percent of the net gain in occupied retail space in Sacramento County was within the city of Elk Grove.

Based upon the project population growth in Elk Grove and some real income recovery as the regional economy moves out of the recent recession, the additional residents of Elk Grove should be able to support approximately 2.2 million square feet of new retail space over the next 20 years (**Table VII-7** and **Table VII-8**). Clearly, Elk Grove enjoys strong long-term retail market demand growth, although its retail volume has not escaped the impact of the recent serious recession.

Table VII-1: County of Sacramento Taxable Retail Store Sales (thousands of dollars)

	1990	1995	2000	2001	2002	2003	2004	2005	2006	2007	Rate of Growth 2000-'07
Apparel Stores	\$309,565	\$325,766	410,328	435,758	483,204	515,374	591,633	646,188	652,320	653,594	59.3%
Gen. Merchandise & Drug	1,385,278	1,429,394	1,960,570	1,996,605	2,024,491	2,105,678	2,267,632	2,381,491	2,454,816	2,447,216	24.8%
Food Stores	597,130	604,318	758,169	792,603	785,010	823,780	850,531	885,721	920,753	920,698	21.4%
Eating & Drinking Places	785,731	887,305	1,163,483	1,242,312	1,310,209	1,375,098	1,488,882	1,606,306	1,687,711	1,717,772	47.6%
Furnishing & Appliances	456,558	531,727	579,375	598,487	640,658	668,311	708,595	735,292	653,574	548,536	-5.3%
Bldg Matrl & Farm Implements	692,435	530,595	995,151	1,166,403	1,247,878	1,414,673	1,630,292	1,666,931	1,511,444	1,290,861	29.7%
Auto Dealers & Supplies	1,237,664	1,262,223	2,280,125	2,539,207	2,611,552	2,618,446	2,752,639	2,831,896	2,636,783	2,567,020	12.6%
Service Stations	527,433	516,520	811,847	816,696	788,871	943,620	1,078,188	1,284,524	1,442,926	1,563,668	92.6%
Other Retail Stores ¹	1,211,084	1,496,900	2,113,483	2,113,396	2,197,104	2,318,838	2,045,400	2,774,063	2,852,716	2,544,502	20.4%
Total Sacramento County	\$7,202,878	\$7,584,748	\$11,072,531	\$11,701,467	\$12,088,977	\$12,783,818	\$13,413,792	\$14,812,412	\$14,813,043	\$14,253,867	28.7%
Annual Growth		2.5%	11.4%	5.7%	3.3%	5.7%	4.9%	10.4%	0.0%	-3.8%	

¹Other Retail Stores include speciality stores, packaged liquor stores, second-hand merchandise, farm and garden supply stores, and fuel and ice dealers, mobile homes, trailers, and campers, boat, motorcycle and plane dealers.

Source: California Board of Equalization

Table VII-2: Per Capita Retail Store Sales in Sacramento County

	1990	1995	2000	2001	2002	2003	2004	2005	2006	2007	Rate of Growth 00-'07
Sacramento County Populati	1,041,219	1,118,600	1,230,247	1,265,948	1,300,112	1,326,638	1,346,677	1,357,916	1,367,737	1,380,232	12.2%
Per Capita Sales											
Apparel Stores	297	291	334	344	372	388	439	476	477	474	42.0%
Gen. Merchandise & Drug ¹	1,370	1,316	1,641	1,624	1,604	1,635	1,734	1,806	1,849	1,826	11.3%
Food Stores ²	1,720	1,621	1,849	1,878	1,811	1,863	1,895	1,957	2,020	2,001	8.2%
Eating & Drinking Places	755	793	946	981	1,008	1,037	1,106	1,183	1,234	1,245	31.6%
Furnishing & Appliances	438	475	471	473	493	504	526	541	478	397	-15.6%
Bldg Materials & Farm Eqmt	665	474	809	921	960	1,066	1,211	1,228	1,105	935	15.6%
Auto Dealers & Supplies	1,189	1,128	1,853	2,006	2,009	1,974	2,044	2,085	1,928	1,860	0.3%
Service Stations	507	462	660	645	607	711	801	946	1,055	1,133	71.7%
Other Retail Stores	1,163	1,338	1,718	1,669	1,690	1,748	1,519	2,043	2,086	1,844	7.3%
Total Sacramento County	\$8,105	\$7,899	\$10,281	\$10,543	\$10,553	\$10,926	\$11,274	\$12,265	\$12,231	\$11,714	13.9%
Annual Growth		1.6%	7.0%	2.5%	0.1%	3.5%	3.2%	8.8%	-0.3%	-4.2%	

¹ Adjusted from taxable sales by 3% to reflect non taxable drug sales

² Adjusted taxable sales by 3 times to reflect total food store sales

Source: California Board of Equalization

Table VII-3: City of Elk Grove Taxable Retail Sales (thousands of dollars)

Fiscal Year	2001	2002	2003	2004	2005	2006	2007	2008	2009	Rate of Growth 2001-09
Apparel Stores	\$7,957	\$25,769	\$35,008	\$40,859	\$63,880	\$67,713	\$71,105	\$71,936	\$72,856	815.6%
Gen. Merchandise & Drug	89,934	129,412	146,758	156,127	142,209	154,810	157,408	153,995	146,310	62.7%
Food Stores	25,984	58,771	60,467	62,310	65,134	66,296	65,506	68,120	66,456	155.8%
Eating & Drinking Places	32,342	79,048	92,941	108,872	121,442	145,348	157,915	159,545	158,362	389.6%
Furnishing & Appliances	10,151	49,281	70,491	87,448	110,251	133,737	129,739	122,239	115,378	1036.7%
Bldg Matrl & Farm Implements	19,361	87,378	93,982	106,719	117,070	134,456	119,399	105,663	90,438	367.1%
Auto Dealers & Supplies	96,095	223,775	250,504	332,915	490,195	547,076	509,868	495,905	346,112	260.2%
Service Stations	29,659	59,369	58,937	87,179	118,159	150,268	166,718	194,771	167,609	465.1%
Other Retail Stores ¹	34,560	79,158	94,323	103,310	125,534	174,080	179,677	169,433	157,773	356.5%
TOTAL	\$346,042	\$791,962	\$903,409	\$1,085,739	\$1,353,874	\$1,573,783	\$1,557,333	\$1,541,606	\$1,321,293	281.8%
Total Sacramento County	\$11,701,467	\$12,088,977	\$12,783,818	\$13,413,792	\$14,812,412	\$14,813,043	\$14,253,867			
Share of County	3.0%	6.6%	7.1%	8.1%	9.1%	10.6%	10.9%			

¹Other Retail Stores include speciality stores, packaged liquor stores, second-hand merchandise, farm and garden supply stores, and fuel and ice dealers, mobile homes, trailers, and campers, boat, motorcycle and plane dealers.

Source: California Board of Equalization

Table VII-4: Per Capita Retail Store Sales in Elk Grove

	2001	2002	2003	2004	2005	2006	2007	2008	2009	Rate of Growth 2001-09
Elk Grove City Population	75,641	81,384	86,487	110,067	121,611	131,064	136,055	139,119	143,002	89.1%
Per Capita Sales										
Apparel Stores	105	317	405	371	525	517	523	517	509	384.3%
Gen. Merchandise & Drug ¹	1,225	1,638	1,748	1,461	1,204	1,217	1,192	1,140	1,054	-13.9%
Food Stores ²	1,031	2,166	2,097	1,698	1,607	1,517	1,444	1,469	1,394	35.3%
Eating & Drinking Places	428	971	1,075	989	999	1,109	1,161	1,147	1,107	159.0%
Furnishing & Appliances	134	606	815	794	907	1,020	954	879	807	501.2%
Bldg Materials & Farm Eqmt	256	1,074	1,087	970	963	1,026	878	760	632	147.1%
Auto Dealers & Supplies	1,270	2,750	2,896	3,025	4,031	4,174	3,748	3,565	2,420	90.5%
Service Stations	392	729	681	792	972	1,147	1,225	1,400	1,172	198.9%
Other Retail Stores	457	973	1,091	939	1,032	1,328	1,321	1,218	1,103	141.5%
Total Sacramento County	\$5,297	\$11,223	\$11,895	\$11,039	\$12,239	\$13,055	\$12,444	\$12,094	\$10,200	92.5%
Annual Growth		111.9%	6.0%	-7.2%	10.9%	6.7%	-4.7%	-2.8%	-15.7%	

¹ Adjusted from taxable sales by 3% to reflect non taxable drug sales

² Adjusted taxable sales by 3 times to reflect total food store sales

Source: California Board of Equalization

Table VII-5: Trends in Sacramento County Retail Space

Period	Bldgs	Total RBA SF	Total Vacant SF	Total Vacant Percentage	Occupied SF	Total Net Absorption	RBA Under Construction	Direct Average Rate
QTD	4,963	68,948,919	7,247,011	10.5%	61,701,908	(210,677)	0	\$18.89/nnn
2009 3Q	4,888	68,302,177	7,021,334	10.3%	61,280,843	(425,346)	15,000	\$19.72/nnn
2009 2Q	4,881	68,212,961	6,506,772	9.5%	61,706,189	2,607	104,216	\$20.01/nnn
2009 1Q	4,874	67,910,248	6,206,666	9.1%	61,703,582	(475,858)	391,929	\$20.52/nnn
2008 4Q	4,869	67,849,239	5,645,715	8.3%	62,203,524	6,561	401,242	\$20.92/nnn
2008 3Q	4,858	67,524,253	5,327,290	7.9%	62,196,963	(163,439)	678,088	\$22.06/nnn
2008 2Q	4,844	67,271,658	4,911,256	7.3%	62,360,402	(342,939)	926,663	\$22.50/nnn
2008 1Q	4,834	67,133,169	4,429,828	6.6%	62,703,341	(34,850)	1,015,585	\$23.14/nnn
2007 4Q	4,813	66,914,253	4,176,062	6.2%	62,738,191	379,224	950,932	\$23.71/nnn
2007 3Q	4,797	66,390,840	4,031,873	6.1%	62,358,967	369,118	1,397,076	\$23.16/nnn
2007 2Q	4,781	66,255,151	4,265,302	6.4%	61,989,849	411,501	1,312,795	\$23.03/nnn
2007 1Q	4,762	65,885,331	4,307,469	6.5%	61,577,862	956,054	1,202,634	\$23.37/nnn
2006 4Q	4,731	65,282,366	4,660,558	7.1%	60,621,808	469,457	1,237,674	\$22.18/nnn
2006 3Q	4,716	64,922,774	4,770,423	7.3%	60,152,351	212,173	1,234,877	\$21.02/nnn
2006 2Q	4,693	64,546,801	4,602,533	7.1%	59,944,268	972,359	1,329,578	\$20.54/nnn
2006 1Q	4,660	63,434,427	4,462,518	7.0%	58,971,909	(111,684)	2,167,366	\$18.91/nnn
2005 4Q	4,613	62,690,912	3,607,319	5.8%	59,083,593	588,716	2,367,950	\$17.52/nnn
2005 3Q	4,587	62,374,901	3,880,049	6.2%	58,494,852	262,554	2,053,103	\$16.90/nnn
2005 2Q	4,568	62,069,266	3,836,968	6.2%	58,232,298	5,522	1,120,567	\$16.81/nnn
2005 1Q	4,563	61,950,139	3,723,363	6.0%	58,226,776	498,126	784,173	\$16.42/nnn
2004 4Q	4,546	61,709,723	3,936,902	6.4%	57,772,821	70,892	769,334	\$15.92/nnn
2004 3Q	4,539	61,335,622	3,633,693	5.9%	57,701,929	(393,545)	992,035	\$14.84/nnn
2004 2Q	4,534	61,254,358	3,158,884	5.2%	58,095,474	304,643	814,684	\$14.49/nnn
2004 1Q	4,520	60,920,806	3,129,975	5.1%	57,790,831	345,564	992,355	\$15.17/nnn
2003 4Q	4,491	60,367,461	2,921,577	4.8%	57,445,884	(166,096)	865,277	\$17.12/nnn
2003 3Q	4,487	60,246,887	2,634,907	4.4%	57,611,980	(413,252)	911,126	\$16.76/nnn
2003 2Q	4,483	60,198,103	2,172,871	3.6%	58,025,232	(695,552)	369,171	\$16.68/nnn
2003 1Q	4,478	60,134,403	1,413,619	2.4%	58,720,784	(39,839)	238,670	\$16.70/nnn
2002 4Q	4,475	59,919,913	1,159,290	1.9%	58,760,623	146,385	300,390	\$12.62/nnn
2002 3Q	4,474	59,419,913	805,675	1.4%	58,614,238	(56,315)	736,690	\$15.42/nnn
2002 2Q	4,471	59,395,399	724,846	1.2%	58,670,553	57,023	759,092	\$14.37/nnn
2002 1Q	4,466	59,284,923	671,393	1.1%	58,613,530	220,138	790,488	\$14.81/nnn
2001 4Q	4,456	59,093,826	700,720	1.2%	58,393,106	46,610	301,573	\$13.79/nnn
2001 3Q	4,456	59,093,826	747,330	1.3%	58,346,496	362,404	270,047	\$9.41/nnn
2001 2Q	4,454	58,937,598	953,506	1.6%	57,984,092	(274,293)	302,928	\$9.71/nnn
2001 1Q	4,452	58,929,923	671,538	1.1%	58,258,385	685,067	163,903	\$9.13/nnn
2000 4Q	4,432	58,322,599	749,281	1.3%	57,573,318	195,495	753,804	\$8.57/nnn
2000 3Q	4,427	58,267,449	889,626	1.5%	57,377,823	(10,584)	801,279	\$9.30/nnn
2000 2Q	4,425	58,247,388	858,981	1.5%	57,388,407	(24,677)	547,724	\$10.10/nnn
2000 1Q	4,421	58,208,520	795,436	1.4%	57,413,084	231,680	74,049	\$9.84/nnn
1999 4Q	4,408	57,953,992	772,588	1.3%	57,181,404	16,558	293,396	\$11.24/nnn
1999 3Q	4,401	57,834,202	668,394	1.2%	57,165,808	12,721	374,318	\$10.12/nnn
1999 2Q	4,399	57,748,605	595,518	1.0%	57,153,087	(11,967)	354,077	\$10.25/nnn
1999 1Q	4,396	57,668,365	503,311	0.9%	57,165,054	232,350	271,453	\$10.11/nnn
1998 4Q	4,384	57,402,498	469,794	0.8%	56,932,704	69,230	421,107	\$10.46/nnn

Source: CoStar

Table VII-6: Trends in Elk Grove Retail Space

Period	Bldgs	Total RBA	Vacant SF	Total Vacant Percentage	Occupied SF	Total Net Absorption	RBA Under Construction	Direct Average Rate
QTD	310	5,635,510	737,666	13.1%	4,897,844	6,609	0	\$22.59/nnn
2009 3Q	297	5,556,055	744,275	13.4%	4,811,780	(48,872)	0	\$24.39/nnn
2009 2Q	297	5,556,055	695,403	12.5%	4,860,652	(50,770)	0	\$25.07/nnn
2009 1Q	297	5,556,055	644,633	11.6%	4,911,422	(153,409)	0	\$25.38/nnn
2008 4Q	297	5,556,055	491,224	8.8%	5,064,831	137,412	0	\$27.51/nnn
2008 3Q	295	5,355,555	428,136	8.0%	4,927,419	2,867	200,500	\$27.98/nnn
2008 2Q	293	5,335,985	411,433	7.7%	4,924,552	(27,137)	220,070	\$28.86/nnn
2008 1Q	293	5,335,985	384,296	7.2%	4,951,689	17,378	209,570	\$30.22/nnn
2007 4Q	291	5,323,779	389,468	7.3%	4,934,311	(41,134)	12,206	\$31.59/nnn
2007 3Q	291	5,323,779	348,334	6.5%	4,975,445	14,968	12,206	\$32.45/nnn
2007 2Q	289	5,312,679	352,202	6.6%	4,960,477	64,969	11,100	\$32.79/nnn
2007 1Q	286	5,247,802	352,294	6.7%	4,895,508	343,620	75,977	\$32.94/nnn
2006 4Q	276	5,022,467	470,579	9.4%	4,551,888	(56,148)	290,212	\$31.67/nnn
2006 3Q	272	4,973,937	365,901	7.4%	4,608,036	12,825	335,142	\$31.91/nnn
2006 2Q	266	4,921,083	325,872	6.6%	4,595,211	68,532	290,525	\$29.39/nnn
2006 1Q	259	4,781,219	254,540	5.3%	4,526,679	348,818	253,683	\$26.03/nnn
2005 4Q	246	4,380,364	202,503	4.6%	4,177,861	116,084	594,053	\$25.75/nnn
2005 3Q	227	4,258,350	196,573	4.6%	4,061,777	26,730	660,554	\$26.04/nnn
2005 2Q	222	4,216,917	181,870	4.3%	4,035,047	(1,733)	575,623	\$24.23/nnn
2005 1Q	222	4,216,917	180,137	4.3%	4,036,780	7,241	279,551	\$22.11/nnn
2004 4Q	222	4,216,917	187,378	4.4%	4,029,539	198,245	232,144	\$27.60/nnn
2004 3Q	220	4,041,535	210,241	5.2%	3,831,294	(51,633)	393,130	\$27.45/nnn
2004 2Q	219	4,019,368	136,441	3.4%	3,882,927	213,762	415,297	\$23.83/nnn
2004 1Q	215	3,813,065	143,900	3.8%	3,669,165	39,734	621,600	\$25.34/nnn
2003 4Q	213	3,766,117	136,686	3.6%	3,629,431	(1,300)	253,251	\$25.75/nnn
2003 3Q	213	3,766,117	135,386	3.6%	3,630,731	10,357	226,753	\$26.26/nnn
2003 2Q	212	3,743,917	123,543	3.3%	3,620,374	58,516	22,200	\$26.26/nnn
2003 1Q	210	3,692,704	130,846	3.5%	3,561,858	(57,746)	73,413	\$21.00/nnn
2002 4Q	210	3,692,704	73,100	2.0%	3,619,604	(20,600)	73,413	\$21.00/nnn
2002 3Q	210	3,692,704	52,500	1.4%	3,640,204	(20,466)	22,200	-
2002 2Q	209	3,680,170	19,500	0.5%	3,660,670	9,800	34,734	-
2002 1Q	208	3,671,870	21,000	0.6%	3,650,870	14,534	43,034	-
2001 4Q	207	3,659,336	23,000	0.6%	3,636,336	900	20,834	-
2001 3Q	207	3,659,336	23,900	0.7%	3,635,436	161,305	12,534	-
2001 2Q	206	3,520,531	46,400	1.3%	3,474,131	(15,800)	138,805	-
2001 1Q	206	3,520,531	30,600	0.9%	3,489,931	320,265	138,805	-
2000 4Q	195	3,198,766	29,100	0.9%	3,169,666	4,600	460,570	-
2000 3Q	195	3,198,766	33,700	1.1%	3,165,066	20,861	460,570	-
2000 2Q	194	3,179,705	35,500	1.1%	3,144,205	(10,700)	264,680	-
2000 1Q	194	3,179,705	24,800	0.8%	3,154,905	152,034	34,181	-
1999 4Q	188	3,023,671	20,800	0.7%	3,002,871	8,010	156,034	-
1999 3Q	187	3,016,623	20,800	0.7%	2,995,823	78,400	163,082	-
1999 2Q	186	2,941,623	24,200	0.8%	2,917,423	35,440	215,122	-
1999 1Q	184	2,906,383	24,400	0.8%	2,881,983	(500)	110,240	-
1998 4Q	184	2,906,383	23,900	0.8%	2,882,483	2,712	110,240	-

Source: CoStar

Table VII-7: Elk Grove Resident Generated Retail Demand & Civic Center Potential (2010-2020)
(Thousands of dollars)

	2010		2020		Elk Grove Demand Growth & Civic Center Capture						
	Elk Grove Population	146,935	184,433	Real Income Adjustment	1.000	1.100	Gain in Sales	Annual Sales/SF	City SF	Share	Civic SF
	Per Capita	Total Market Area Demand									
Apparel Stores	0.509	\$74,859	\$103,373	\$28,513	\$300	95,044	0.0%	0			
Gen. Merchandise & Drug	1.054	154,844	213,822	58,978	300	196,594	0.0%	0			
Food Stores	1.394	204,851	282,876	78,025	425	183,589	0.2%	367			
Eating & Drinking Places	1.107	162,716	224,693	61,977	375	165,271	4.0%	6,611			
Furnishing & Appliances	0.807	118,551	163,705	45,154	275	164,198	0.0%	0			
Bldg Materials & Hardware	0.632	92,925	128,319	35,394	250	141,576	0.0%	0			
Auto Dealers & Supplies	2.420	355,630	491,086	135,455	NA	NA	NA	NA			
Service Stations	1.172	172,218	237,814	65,596	NA	NA	NA	NA			
Other Retail Stores	1.103	162,111	223,858	61,746	300	205,821	0.5%	1,029			
Total Retail Stores	\$10.200	\$1,498,706	\$2,069,545	\$570,839		1,152,092	0.7%	8,007			
Local Services @ 10% of Retail Store Total								801			
Total Resident Generated Retail and Restaurant Demand at Civic Center 2010-20								8,808			

Source: AECOM

Table VII-8: Elk Grove Resident Generated Retail Demand & Civic Center Potential (2020-2030)
(Thousands of dollars)

	2020		2030		Elk Grove Demand Growth & Civic Center Capture						
	Elk Grove Population	184,433	210,874	Real Income Adjustment	1.100	1.210	Gain in Sales	Annual Sales/SF	City SF	Gain in SF Share	Civic SF
	Per Capita	Total Market Area Demand									
Apparel Stores	0.509	\$103,373	\$130,027		\$26,655	\$300	88,849	0.0%	0		
Gen. Merchandise & Drug	1.054	213,822	268,956		55,134	300	183,780	0.0%	0		
Food Stores	1.394	282,876	355,816		72,940	425	171,622	0.2%	343		
Eating & Drinking Places	1.107	224,693	282,630		57,937	375	154,499	3.0%	4,635		
Furnishing & Appliances	0.807	163,705	205,916		42,211	275	153,496	0.0%	0		
Bldg Materials & Hardware	0.632	128,319	161,406		33,087	250	132,348	0.0%	0		
Auto Dealers & Supplies	2.420	491,086	617,712		126,626	NA	NA	NA	NA		
Service Stations	1.172	237,814	299,134		61,320	NA	NA	NA	NA		
Other Retail Stores	1.103	223,858	281,579		57,722	300	192,406	0.5%	962		
Total Retail Stores	\$10.200	\$2,069,545	\$2,603,177		\$533,632		1,076,999	0.6%	5,940		
Local Services @ 10% of Retail Store Total									594		
Total Resident Generated Retail and Restaurant Demand at Civic Center 2020-30										6,534	

Source: AECOM

Location

The Civic Center site is a community or local serving retail location. In a suburban and automobile served city like Elk Grove, the regional retail will need to locate near and ideally visible from the freeways to be successful. The Elk Grove Civic Center site does not have the location essential for successful regional retail development, like Victoria Gardens in Rancho Cucamonga, because of superior alternative locations along SR-99 and I-5.

Agglomeration

Successful retail districts also depend upon the concentration or agglomeration of retail stores. This is because consumers save time being able to visit a large number retail stores in one trip. Some locations where one or two stores are not able to succeed can support a concentration of 50 stores. Shopping centers have proven this theory time and time again. In addition, ample parking is essential to retail success in a community that has the land use pattern of Elk Grove. For example, a neighborhood retail center of 100,000 square feet will require nine or ten acres, or approximately half of the Civic Center site. If it is the City's primary objective to create a noteworthy Civic Center, the 21 acre Civic Center site does not have sufficient land area to accommodate a significant retail complex.

Competition

Any retail development at the Civic Center will need to be able to withstand significant future competition. A regional scale retail development has been approved in the southern part of the city at Grant Line Road and SR-99 on the site of the 295-acre Lent Ranch property. The core of this project is a 1.1 million square feet regional and lifestyle retail center called Elk Grove Promenade. It is proposed to have two anchor department stores, a Target discount store, a cinema complex, a large format bookstore, a 5,000 square foot food court, six restaurant pads and 454,000 square feet of shop space. It will also have a park-like outdoor space with a water feature, seating, art and walkways in the center of the project. Its layout is that of a regional shopping center with parking on the outside surrounded by a ring road. The contemporary element is that it is an open air center with the central spine enjoying automobile access and providing on-street diagonal parking.

Upon recent inspection, the steel frame of most of the retail buildings are already in place. However, the recent financial crisis has caused construction to be suspended. Sufficient value in both the entitlements and the construction has already been created that we expect this project to be eventually completed. It is a matter of "who" and "when" rather than "if." With this very significant retail complex expected within one or two miles of the subject property, an ambitious retail or cinema program at the Civic Center site makes no market sense.

Recommended Program

Our recommended retail program, based upon the above market evaluation and the detailed analysis in **Table VII-9** is about 20,000 square feet of space consisting of a 10,000 square foot destination restaurant with added catering capacity to be able to cater events at the Civic Center such as weddings and community banquets. Ideally this restaurant would be affiliated with a nearby conference hotel. The additional square footage would consist of a pizza parlor/sports bar of 4,000 square feet, located to serve the sports complex and to provide catering for birthday parties at the children's discovery museum, and 6,000 square feet of concession space integrated with the library, performing arts center and/or community center – coffee shop, snack bar, card shop and the like.

Table VII-9: Elk Grove Civic Center Total Retail Demand in Square Feet by 2030

	2010-20		2020-30		Total 2010-2030		
	Resident	Visitor	Resident	Visitor	Resident	Visitor	Total
Food Stores	367	147	343	172	710	318	1,029
Eating & Drinking Places	6,611	1,983	4,635	2,317	11,246	4,301	15,547
Other Retail Stores	1,029	360	962	433	1,991	793	2,784
Total Retail Stores	8,007	2,490	5,940	2,922	13,947	5,412	19,360

Source: AECOM

Hotel and Conference Center

Elk Grove is at the confluence of two conflicting sets of market forces in terms of hotel development potential. The first is strong long-term market growth due to rapid population and employment growth in the city combined with excellent north-south freeway access from SR-99 and I-5 outside the area of central Sacramento congestion. The second is an extremely weak near term Sacramento regional hotel market due to the recession.

Elk Grove currently has six hotels and all are of the select service category. These six properties total 561 rooms and are all located near either SR-99 or I-5 exits (**Table VII-10**). The Hilton Garden Inn is one of the two largest with 116 rooms and has 7,100 square feet of meeting space. The Holiday Inn Express also has 116 rooms but only 2,900 square feet of meeting space. The other four properties do not have significant meeting space. Elk Grove currently does not have a full service hotel with serious conferencing capabilities.

Since Elk Grove has a short history in terms of hotel development, the City of Sacramento hotel market performance was reviewed to provide a frame of reference (**Table VII-11**). As indicated in this table, room revenue in Sacramento more than doubled from \$79 million in FY1994-95 to \$175 million by FY2007-08. However, due to the dramatic economic slowdown, room revenue fell 10 percent to \$158 million in FY2008-09. Over this 14 year period, the approximate number of supportable rooms climbed from 4,523 to 6,850 for a gain of 2,327. Based upon this long-term trend, the city of Sacramento hotel market added 166 rooms per year (**Table VII-12**).

Using a similar metric, we estimate that Elk Grove's hotel demand has been growing at the rate of 50 to 60 rooms per year. Room revenue in Elk Grove has climbed from \$2.3 million in FY2003-04 to \$8.6 million in FY2008-09. In contrast to Sacramento's sharp decline, room revenue increased by seven percent this past year. While the Elk Grove market has performed well, developers planning their projects during the easy credit period of four or five years ago have actually built in anticipation of even faster demand growth. With the recent additions, Elk Grove has 561 rooms while the current market is only able to support an estimated 375 to 400 rooms.

The near term forecast for the Sacramento region by PKF Hospitality Research is fairly sobering. Overall occupancy rate is projected to hover around 50 percent until 2013 while market equilibrium is more like 65 percent. The occupancy rate should be in or exceed the high 70 percent range before new construction can be justified. PKF also does not expect the average daily room rate to climb back to the 2008 level of \$104 until 2013 as well (**Table VII-13**).

Table VII-10: Hotels in Elk Grove

Name	Address	Units	Rack Rates	Average Price	Total SF of Meeting Space
Hampton Inn Suites	2305 Longport Ct	110	\$99-\$109	\$105	650
Hilton Garden Inn	9241 Laguna Springs Dr	116	\$122-\$159	\$135	7,086
Fairfield Inn & Suites	8058 Orchard Loop	62	\$119-\$169	\$138	550
Holiday Inn Express	9175 W. Stockton Blvd	116	\$125-\$160	\$132	2,916
Holiday Inn Express ¹	2460 Maritime Dr	65	\$105-\$150	\$103	600
Extended Inn/Stay America	2201 Long Port Court	92	\$50-\$82	\$54	NA
Average		NA	\$103-\$133	\$111	NA
Total		561	NA	NA	11,802

Source:AECOM

Table VII-11: City of Sacramento Hotel Room Demand Estimated from Transient Occupancy

Fiscal Year	TOT Rev (\$1,000)	TOT Rate	Room Rev (\$1,000)	Annual Percent Change	Estimated RevPAR	Supportable Rooms Estimate
1994-95	\$9,477	12.0%	\$78,975	NA	\$47.84	4,523
1995-96	9,826	12.0%	81,883	3.7%	49.06	4,573
1996-97	10,441	12.0%	87,008	6.3%	50.32	4,737
1997-98	11,940	12.0%	99,500	14.4%	51.61	5,282
1998-99	12,795	12.0%	106,625	7.2%	52.93	5,519
1999-00	13,842	12.0%	115,350	8.2%	54.29	5,821
2000-01	15,786	12.0%	131,550	14.0%	55.68	6,473
2002-02	15,762	12.0%	131,350	-0.2%	57.11	6,301
2002-03	16,199	12.0%	134,992	2.8%	58.58	6,314
2003-04	16,106	12.0%	134,217	-0.6%	60.08	6,121
2004-05	17,238	12.0%	143,650	7.0%	61.62	6,387
2005-06	18,495	12.0%	154,125	7.3%	63.20	6,682
2006-07	20,587	12.0%	171,558	11.3%	64.82	7,251
2007-08	21,023	12.0%	175,192	2.1%	66.48	7,220
2008-09	18,950	12.0%	157,917	-9.9%	63.16	6,850
Avg Growth Rate				5.3%		

Source: City of Elk Grove

Table VII-12: Elk Grove Hotel Room Demand Estimated from Transient Occupancy Tax Collection

Fiscal Year	TOT Rev (\$1,000)	TOT Rate	Room Rev (\$1,000)	Annual Percent Change	Estimated Rev/PAR	Supportable Rooms
2003-04	\$281	12.0%	\$2,342	NA	\$56.48	114
2004-05	566	12.0%	4,717	101.4%	57.93	223
2005-06	816	12.0%	6,800	44.2%	59.41	314
2006-07	863	12.0%	7,192	5.8%	60.94	323
2007-08	970	12.0%	8,083	12.4%	62.50	354
2008-09	1,037	12.0%	8,642	6.9%	63.44	373

Avg Growth Rate

34.1%

Source: City of Elk Grove and State Controller's Office

Table VII-13: Sacramento Region Hotel Market Forecast Summary by PKF

Year	Change in		Change in		RevPAR	Change in RevPAR
	Occupancy	ADR	ADR	RevPAR		
2004	65.2%	1.7%	\$88.35	2.2%	\$57.60	3.9%
2005	65.5%	0.5%	\$92.48	4.7%	\$60.60	5.2%
2006	65.0%	-0.8%	\$100.28	8.4%	\$65.17	7.5%
2007	62.5%	-3.9%	\$103.96	3.7%	\$64.94	-0.4%
2008	58.9%	-5.7%	\$104.44	0.5%	\$61.54	-5.2%
2009F	51.5%	-12.6%	\$94.30	-9.7%	\$48.54	-21.1%
2010F	49.7%	-3.4%	\$93.65	-0.7%	\$46.59	-4.0%
2011F	50.7%	1.9%	\$97.04	3.6%	\$49.19	5.6%
2012F	51.7%	2.1%	\$101.55	4.6%	\$52.53	6.8%
2013F	51.9%	0.3%	\$104.64	3.0%	\$54.27	3.3%

Source: PKF Hotel Horizons

Hotel Market Conclusions

Because of falling demand in the regional market and de-accelerating demand growth in Elk Grove, both the regional and local hotel markets are currently over-supplied. It will require economic recovery and three or four years of demand growth for the regional market to regain equilibrium. While the Elk Grove market is expected to rebound faster than the regional market, serious planning for the next round of hotel construction is not likely to take place until 2012 or later.

Recommendations for the Civic Center

The City of Elk Grove is currently planning for a Civic Center that will be a community gathering place and a symbol of the city for 50 years or more. With this long-term view, ERA AECOM strongly recommends that the City reserve the eastern most five acres of the Civic Center site for the future development of a hotel, conference center and restaurant complex. Development interest for this complex should start to solidify by the 2012 to 2015 time frame. Our specific program recommendations include:

- A full service hotel of approximately 200 rooms.
- A conference center of 14,000 to 16,000 square feet.
- A dinner restaurant of approximately 10,000 square feet.
- Sufficient adjacent land area for large tents to house occasional larger scale events and exhibits.

This complex should be designed to be highly visible to the corner of Elk Grove Boulevard and Big Horn Boulevard but also to have views of the planned park, lake, gardens or other amenities. In addition to generating sales tax and land lease revenue, the transient occupancy tax (TOT) from this hotel is like to be \$900,000 to \$1.0 million per year. The conference center would be able to house business, medical, educational and community events. The restaurant, in addition to being its own destination, should have sufficient capability to cater events in the conference center and the balance of the Civic Center complex.

With one or more potential hotel development sites in the Lent Ranch Special Planning Area and likely elsewhere, the City may need to be fairly aggressive in attracting a full service hotel of the desired quality to the Civic Center complex. The attraction strategy should include some combination of the following:

- A well planned and well designed Civic Center complex that is substantially underway.
- A highly visible hotel site with views onto amenities.
- Below market land lease for the first five or ten years.

- City construction of the conference center, which would be conveyed to the hotel for integrated hotel/conference center operations in exchange for guaranteed dates for key community events. (A municipally operated conference center is likely to require annual General Fund subsidy in the range of \$500,000 per year.)

A hotel, conference center and restaurant complex would be highly compatible with a Civic Center and would enhance its overall appeal to locals and visitors. In addition, it would generate transient occupancy tax, some sales tax and relieve the City of the operating cost of a conference center.

VIII. Appendix

ERA AECOM conducted interviews and contacted the following individuals as part of this research:

Cultural Facilities

Children's Discovery Center

- Kathleen Paley, President, Sacramento Children's Museum
- Jim Falls, Strikes Family Entertainment Center

Library

- Donald Tucker, Director of Facilities, Sacramento Public Library
- Jonathan Barber, Management Analyst, Sacramento Public Library
- Rivkah Sass, Library Director, Sacramento Public Library

Art Center

- Cheryl Greiss, Elk Grove Artists and Elk Grove Fine Arts Center
- Marsha Holmes, Committee for the Arts (Council appointed)
- Kelly Gonzalez, CSD Recreation Superintendent

Performing Arts Center

- Lisa Brown, Encore: Studio of the Performing Arts
- Bob Baxter, Director, Runaway Stage Productions
- Jason Bramhams, Cosumnes Oaks High School Theater Director
- CRC Theater Director
- River City Theater Company

Veteran's Memorial Hall

- Jerry Rucker, Veteran's Affairs

Public Assembly and Public Facilities

- Paula Shroeder, Elk Grove Chamber of Commerce
- Steve Czarnecki, Elk Grove Economic Development Corporation
- Celeste Armendariz, Celeste Wedding Planners
- Sharon Renzo, Weddings by Design
- Tom Moran, Methodist Hospital
- Janet Wagner, CEO, SDH, CAO Sutter Health
- Stephanie Beasley, Communications Manager, Frontier Communications
- Elizabeth Graswich, Communications Director, Elk Grove Unified School District
- Rob Pierce, Facilities Manager, Elk Grove Unified School District
- Patrick Larkin, Recreation Supervisor III, Parks & Recreation Department, Cosumnes Community Services District

- Charlotte Mitchell, Executive Director, Sacramento County Farm Bureau
- TJ Plew, CEO and Fair Manager, Sacramento County Fair

Public Recreational Facilities

- Bob Roessler (Parks & Recreation Administrator)
- Mike Dopson (Recreation Supervisor II (Aquatics, Leisure & Therapeutic Recreation))
- Patrick Larkin (Recreation Supervisor III (Teens & Skate Park))

Civic Center Design Study Scope of Work

The Design Study will be a short-term, non-technical study meant to create a wealth of possible inspiring ideas for the Civic Center. Its basic parameters are:

- A short (2 – 3 months long) design only exercise
- No technical consultants
- Generate between 4 to 6 alternative designs incorporating different mixes of program and qualities and characters of space
- Designs are represented primarily as rendered images showing atmospheres and character.
- Designs are each very different from one another, representing a wide range of possibilities.

The Design Team will undertake the Civic Center Design Study in the following manner:

Preliminary Concepts Development

The design professionals from Zaha Hadid Limited will begin a preliminary concept development phase creating 4-6 concepts for the Civic Center site. Following concept development, the design team will participate in a workshop with the community displaying the design concepts for discussion and feedback.

Workshop 6: This workshop will be conducted upon completion of the 4-6 preliminary concepts. The architects will introduce each alternative and describe the process by which the design was inspired. Community members will be provided with another live polling opportunity to determine if any one design is preferred over others.

Date: January 2009

Development of Civic Center Design Alternatives

The design team will then return to their studios to refine and more fully develop several of the plans (2-4) that received the most positive response from the community. The design work will be completed and the community will be provided with an opportunity to review and discuss the proposed design study alternatives prior to any formal consideration of the designs by the City Council.

Workshop 7: This workshop will be conducted upon completion of development of the design study alternatives. Community members will be provided with another live polling opportunity to determine if any one design is preferred over others.

Date: February/March 2009

Council Consideration of Design Study Alternatives

Following completion of these steps, the Civic Center Design Study will be presented to the City Council for consideration. The City Council would be provided with an overview of the process and results to date including an opportunity to review the 2-4

top alternatives reviewed by the community at Workshop 7. The Council would be expected to narrow down and select a handful (2-3) of alternatives for final refinement by the design team.

Date: March 2009

Final Design Study Refinement and Presentation

The Council selected plans would be finalized by the Zaha Hadid team for final presentation to the City Council. The products resulting from this process are anticipated to be initial “visioning” documents for the Civic Center, conceptually identifying building locations, outdoor features, and other project components. While it is anticipated that the City Council will be provided with information regarding public/private partnerships for the project prior to this date, this presentation will include a status report of those efforts in addition to the Design Study discussion.

Council Presentation: April 2009

The Design Study will conclude with production of 11x17 bound, 50 page, color architectural renderings with verbal descriptions of the 4-6 design alternatives.