

# Settler's Hill Cross-Country Course Market and Feasibility Study



**Hunden Strategic Partners**

**June 16, 2015**

# Settler's Hill Cross-Country Course Key Questions

- What makes Settler's Hill Cross-Country Course attractive?
- How does Settler's Hill fit in with existing assets?
- What facilities statewide host cross-country events? Is there demand for a new, dedicated cross-country course?
- What are the competitive cross-country facilities nationally and where are they located? Any lessons learned?
- Who will use Settler's Hill? What are all potential uses of Settler's Hill?

# Settler's Hill Cross-Country Course Key Questions

- Are there any governance or management options that would change the outcome for Settler's Hill (private mgmt, non-prof group, Forest Preserve)? Pro's/Con's
- What is the likely demand schedule look like for Settler's Hill?
- What is the likely income/expense model for Settler's Hill?
- What is the likely economic impact from Settler's Hill?

# Headlines

- Settler's Hill will add to the sports assets in the community.
- Settler's Hill is an ideal site to alleviate events and congestion from Forest Preserves and other public facilities.
- Overall positive perception of project in the community.
- Settler's Hill will mostly accommodate high school events. High profile events will need to be bid on.
- User groups at all levels and sizes have interest in holding events at Settler's Hill.

# Headlines

- Settler's Hill will alleviate many event challenges, but must be at a comparable cost.
- Parking/admission fees will be critical to financial performance of venue.
- Facility will likely be operated by non-profit entity.
- Kane County communities will see more economic impact than County.

## Settler's Hill Cross-Country Course











## Course Guidelines

- All runners are equidistant from start line to first turn.
- First turn is not less than 600 meters from start line. NCAA is expected to reduce requirement to 400 meters.
- Course must be ten meters wide and include a one-meter wide obstacle-free zone.
- Last 200 meters of course must be straight, flat and at least ten meters wide.
- No inclines greater than eight percent.

How does Settler's Hill fit in with existing assets?

## Existing Assets

Fox Valley Ice Arena



Settler's Hill Golf Course

Fifth Third Ballpark



Fox valley Soccer Club



- All facilities are adjacent to Settler's Hill.
- Majority of Settler's Hill use will not conflict with events at other facilities.
- Shared parking is critical for Settler's Hill.

# Parking Accommodations

## Settler's Hill Parking Analysis

Facility	Parking Spaces	Assumed Parked Visitors	Peak Usage	Peak Parked Attendance	Available Parking during Peak Periods	Charge for Parking
Fifth Third Bank Ballpark	1,900	5,700	100%	5,700	0	Yes
Fox Valley Ice Arena	570	1,710	50%	855	285	No
Golf Course	95	285	100%	285	0	No
Fox Valley Soccer Club	40	120	50%	60	20	No
<b>Total</b>	<b>2,605</b>	<b>7,815</b>	-	<b>6,900</b>	<b>305</b>	-
Settler's Hill Parking	215	645	100%	645	0	Yes
<b>Total Possible Parking</b>	<b>2,820</b>	<b>8,460</b>	--	--	--	--

Source: Kane County Forest Preserve District, Weaver Boos Consultants, Hunden Strategic Partners

- Parking is one of biggest issues for cross-country events.
- Cougars expressed no issues with Settler's Hill using their parking.
- Settler's Hill Golf Course likely unavailable.
- Approximately 2,725 parking spaces available adjacent to Settler's Hill.
- Parking/admission fee critical to financial success of Settler's Hill



What facilities statewide host cross-country events? Is there demand for a new, dedicated cross-country course?

# Kane County Cross-Country Sites

Kane County High School Cross Country Sites				
Name	City	Distance From Settler's Hill	Events	Course Type
Aurora (Marmion Academy)	Aurora	6	Royal Cadet Invite	High School Campus
St. Charles East High School	St. Charles	7	IHSA Sectional	High School Campus
Waubonsie Valley High School	Aurora	13	Aurora City Meet	High School Campus
Kaneland High School	Maple Park	13	Eddington Invite, IHSA Sectional	High School Campus
Burlington Central High School	Hampshire	18	Central Invite, Rocket Invite, Genoa Kingston Matt Walter Invite	High School Campus
LeRoy Oakes Forest Preserve	St. Charles	8	Leavey Invite, St. Charles North Invite, UEC Meets, IHSA Sectionals	Forest Preserve
Oakhurst Forest Preserve	Aurora	10	Aurora Central Catholic Classic	Forest Preserve
Elburn Forest Preserve	Elburn	13	Kaneland Invite	Forest Preserve
Robert I Stuart Sports Complex	Aurora	13	West Aurora Stampede	Other
Lord's Park	Elgin	15	Elgin Cross-Country Classic, UEC Conference Meet	Park

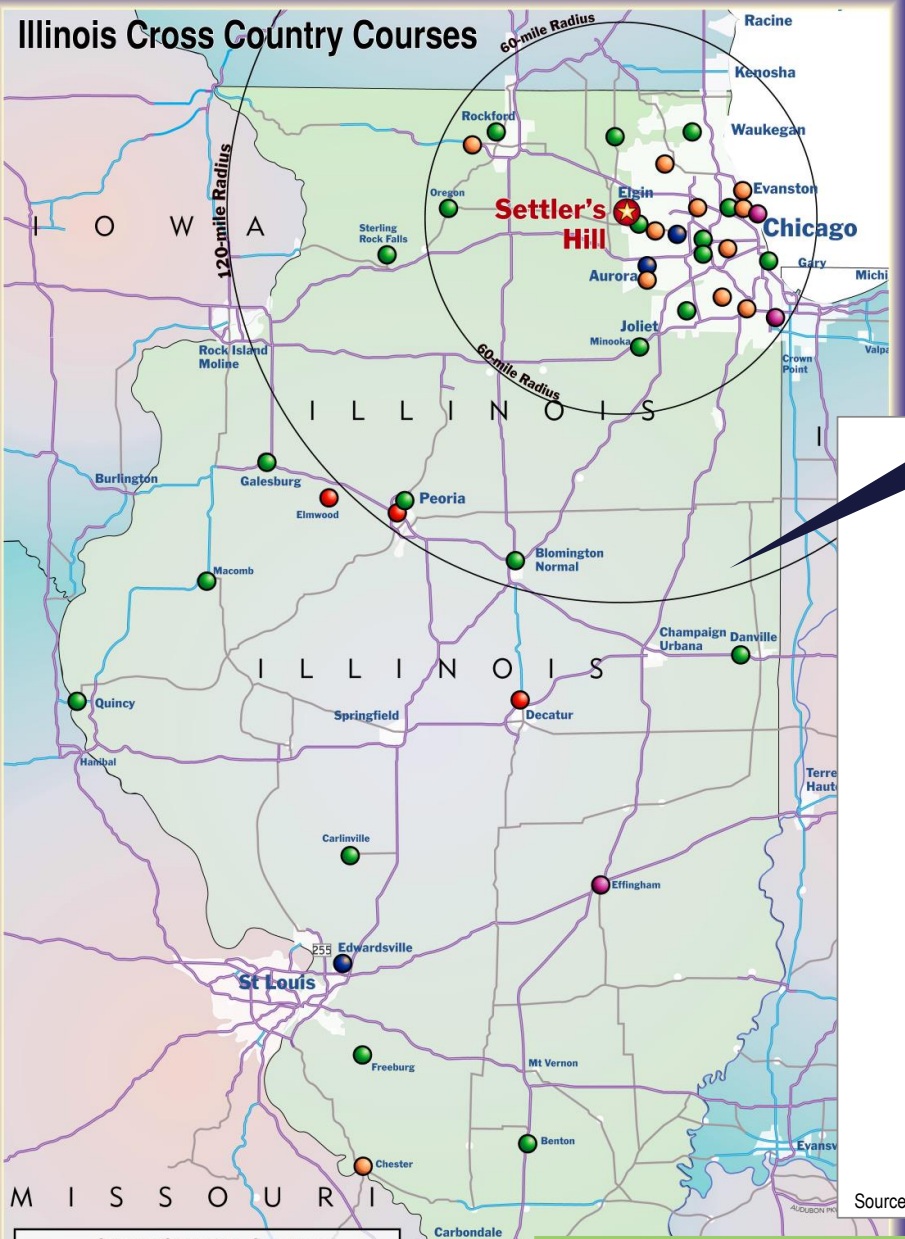
Source: HSP, Various Facilities

will be difficult to relocate events taking place at school's campuses.

Events are facing event logistics challenges; parking, spectator capacity.

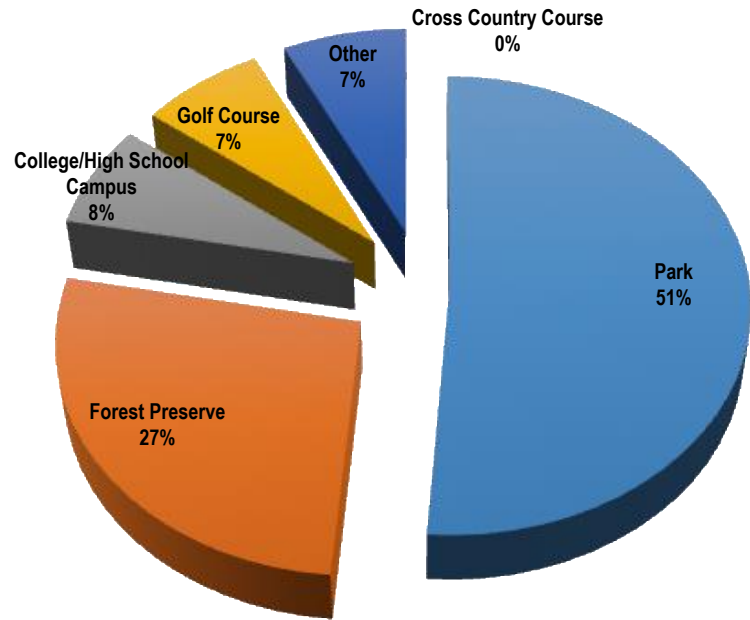
Events face rising rental costs and calendar date conflicts

# Illinois Cross Country Courses



## Illinois Cross-Country Sites

### IHSA Sanctioned Cross-Country Course Types



Source: IHSA, Hunden Strategic Partners

Facilities that host Sectional and Regional events.



# Illinois Cross-Country Course Supply

- Kane County schools primarily use school campus or Forest Preserve sites.
- Majority of facilities hosting sectional and regional events are Forest Preserves and Parks.
- Site issues for facilities include parking, gate control, capacity constraints, EMS as well as calendar conflicts.
- Settler's Hill would be only cross-country specific course in Illinois.
- Detweiller Park in Peoria hosts state championships every year and will continue to do so.



What are the competitive cross-country facilities nationally and where are they located?  
Any lessons learned?

# Relevant Cross-Country Courses

## National Comparable/Competitive Cross Country Courses

Name	City	State	Course Type	Hosts National
Lavern Gibson Championship CC Course	Terre Haute	IN	Cross Country Course	✓
Mt. SAC Cross Country Course	Walnut	CA	Cross Country Course	✓
Rim Rock Farm	Lawrence	KS	Cross Country Course	
UW-Parkside: Parkside Cross Country Course	Kenosha	WI	Cross Country Course	
UW-Madison: Zimmer Championship Course	Verona	WI	Cross Country Course	
Balboa Park	San Diego	CA	Park	
Franklin Park	Boston	MA	Park	
Holmdel Park	Holmdel	NJ	Park	
Van Cortlandt Park	Bronx	NY	Park	✓
Belmont Plateau	Philadelphia	PA	Park	

Source: HSP, Various Facilities

## Relevant Courses Implications

- LaVern Gibson in Terre Haute, IN is most comparable - only course developed on a closed landfill.
  - Operated by all volunteers
  - \$40-\$50k annual maintenance costs
  - Only used for cross-country events, closed to public
  - CVB supplements maintenance budget. Bed tax pays remainder of budget that fees don't cover.
- Most courses are owned or operator by a college or university.
- Success factors: Site lines, meet USATF guidelines, established annual events, strong operator/user group support.

Who will use Settler's Hill? What are all potential uses of Settler's Hill?



# Kane County Schools

IHSA Conferences Near Settler's Hill					
Northern Illinois Big Twelve	Fox Valley	Metro Suburban	Northeastern Athletic	Suburban Christian	Upstate Eight
DeKalb H.S.	Cary-Grove H.S.	Aurora Central Catholic H.S.	Alden Hebron H.S.	Aurora Christian H.S.	Bartlett H.S.
Kaneland H.S.	Crystal Lake Central H.S.	Chicago Christian H.S.	Christian Liberty Academy	Marmion Academy	Batavia H.S.
Morris Community H.S.	Crystal Lake South H.S.	Elmwood Park H.S.	Christian Life H.S.	Montini Catholic H.S.	East Aurora H.S.
Sycamore H.S.	Dundee-Crown H.S.	Fenton H.S.	Faith Lutheran H.S.	Rosary	Elgin H.S.
Yorkville H.S.	Grayslake Central H.S.	Glenbard South H.S.	Harvest Christian Academy	St. Francis	Geneva H.S.
Rochelle Township H.S.	Grayslake North H.S.	Guerin Preparatory H.S.	Hiawatha H.S.		Glenbard East H.S.
Geneseo H.S.	Hampshire H.S.	Illiana Christian H.S.	Illinois Math and Science Academy		Larkin H.S.
LaSalle-Peru H.S.	Huntley H.S.	Immaculate Conception Catholic Prep	Keith Country Day School		Metea Valley H.S.
Ottawa Township H.S.	Jacobs H.S.	Ridgewood H.S.	Luther H.S. North		Neuqua Valley H.S.
Sterling H.S.	McHenry East H.S.	Riverside Brookfield H.S.	Mooseheart School		South Elgin H.S.
	Prairie Ridge	St. Edward Central Catholic H.S.	Westminster Christian School		St. Charles East
	Woodstock H.S.	Timothy Christian School			St. Charles North H.S.
	Woodstock North H.S.	Walther Christian Academy			Streamwood H.S.
		Wheaton Academy			Waubonsie Valley High School
					West Aurora H.S.
					West Chicago Community H.S.
10	13	14	11	5	16

Source: IHSA

- Six conferences with 23 schools located in Kane County.
- Upstate Eight most represented conference in Kane County (11 schools).
- Opportunity to host sectional and regional events.

# Kane County Cross-Country Sites

Kane County High School Cross Country Sites				
Name	City	Distance From Settler's Hill	Events	Course Type
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Lord's Park	Elgin	15	Elgin Cross-Country Classic, UEC Conference Meet	Park

Source: HSP, Various Facilities

- Most events are held on school campuses or Forest Preserves.
- Opportunity to relocate events to Settler's Hill to relieve Forest Preserve.
- Settler's Hill would be a higher quality and more efficient venue logistically and financially.

# Settler's Hill Implications

- Settler's Hill will likely attract high school, collegiate and sanctioned events.
- Course would require less set up costs and time due to permanent concessions, bathrooms, and course marshals. Onsite timing equipment would provide a turnkey operation so groups do not have to contract another vendor.
- The ease of use and costs will impact events willingness to relocate. Must provide event efficiencies and comparable costs to existing event operations.
- Venue would allow events to increase number of teams and overall participation levels.

# Settler's Hill Implications

- \$5 parking/admission fee is not perceived to be a major issue.
- High schools will want concession revenue share. Primary fundraising source for programs.
- Could take a few years relocate events.
- Recreational and daily use will likely compromise course conditions.
- Lack of shade/coverage for spectators is a concern, but manageable.

Any governance or management options that would improve outcome for Settler's Hill (private mgmt, non-prof group, Forest Preserve)? Pro's/Con's



## Settler's Hill Governance

- Settler's Hill will likely not generate enough revenue to attract a private, third-party operator.
- Facility will need to be operated as a business by an expert in cross-country to minimize operating deficit or possibly reach breakeven.
- Marketing and operations of facility must be a community effort. Support from CVBs, Forest Preserve, County and user groups must be in place.
- Maintenance is expected to be one of largest expenses.

What is the likely demand schedule look like for Settler's Hill?

# Settler's Hill Demand

Projected Schedule of Events by Category and Year

Category	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
<b>Existing Events</b>										
High School	1	1	1	2	2	2	2	3	3	3
IHSA Sectional	1	2	2	2	2	2	2	2	2	2
IHSA Regional	1	2	2	2	2	2	2	2	2	2
Collegiate	0	0	1	1	1	1	1	1	1	1
Community Runs	1	1	1	1	2	2	2	2	2	2
<b>New Events</b>										
High School	0	0	1	1	1	1	1	1	1	1
Collegiate	0	0	0	1	1	1	1	1	1	1
Community Runs	1	1	1	1	1	1	1	1	1	1
Open	1	1	1	1	2	2	2	2	2	2
Youth	0	0	0	0	1	1	1	1	1	1
Master's	0	0	0	0	0	1	1	1	1	1
Other Low Impact Sporting Events	0	0	0	1	1	1	1	1	1	1
Non-Sporting Event	1	1	1	1	1	1	1	1	1	1
<b>Total</b>	<b>7</b>	<b>9</b>	<b>11</b>	<b>14</b>	<b>17</b>	<b>18</b>	<b>18</b>	<b>19</b>	<b>19</b>	<b>19</b>

Source: Hunden Strategic Partners

# Settler's Hill Demand

Projected Attendance by Category and Year

Category	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
<b>Existing Events</b>										
High School	4,200	4,242	4,284	8,655	8,741	8,828	8,917	13,509	13,644	13,780
IHSA Sectional	2,520	5,040	5,040	5,040	5,040	5,040	5,040	5,040	5,040	5,040
IHSA Regional	1,125	2,250	2,250	2,250	2,250	2,250	2,250	2,250	2,250	2,250
Collegiate	0	0	1,056	1,066	1,077	1,088	1,099	1,110	1,121	1,132
Community Runs	1,500	1,545	1,591	1,639	3,377	3,478	3,582	3,690	3,800	3,914
<b>New Events</b>										
High School	0	0	2,497	2,547	2,598	2,650	2,703	2,757	2,812	2,868
Collegiate	0	0	0	1,066	1,077	1,088	1,099	1,110	1,121	1,132
Community Runs	1,200	1,236	1,273	1,311	1,351	1,391	1,433	1,476	1,520	1,566
Open	3,360	3,427	3,496	3,566	7,274	7,419	7,568	7,719	7,874	8,031
Youth	0	0	0	0	3,247	3,312	3,378	3,446	3,515	3,585
Master's	0	0	0	0	0	1,016	1,036	1,057	1,078	1,099
Other Low Impact Sporting Events	0	0	0	597	609	621	633	646	659	672
Non-Sporting Event	3,450	3,554	3,660	3,770	3,883	3,999	4,119	4,243	4,370	4,501
<b>Total</b>	<b>17,355</b>	<b>21,294</b>	<b>25,147</b>	<b>31,507</b>	<b>40,523</b>	<b>42,181</b>	<b>42,857</b>	<b>48,052</b>	<b>48,804</b>	<b>49,572</b>

Source: Hunden Strategic Partners

What is the likely income/expense model for Settler's Hill?



# Settler's Hill Financial Projections

## Settler's Hill Financial Projection (thousands of inflated dollars)

Item	Fiscal Year									
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
<b>Operating Revenue</b>										
Rent	\$26	\$34	\$44	\$59	\$74	\$82	\$84	\$91	\$94	\$97
Concession	\$3	\$3	\$4	\$5	\$7	\$7	\$8	\$9	\$9	\$10
Parking	\$17	\$31	\$35	\$50	\$68	\$70	\$70	\$88	\$89	\$90
<b>Total Revenue</b>	\$46	\$69	\$83	\$113	\$149	\$159	\$162	\$188	\$192	\$196
<b>Operating Expense</b>										
Fixed										
Salary - Permanent Staff	\$68	\$70	\$72	\$74	\$77	\$79	\$81	\$84	\$86	\$89
Benefits - Permanent Staff	\$22	\$23	\$24	\$25	\$25	\$26	\$27	\$28	\$28	\$29
General and Administrative	\$18	\$19	\$19	\$20	\$21	\$21	\$22	\$23	\$23	\$24
Utilities	\$2	\$2	\$3	\$3	\$3	\$3	\$3	\$3	\$3	\$3
Repairs and Maintenance	\$45	\$46	\$48	\$49	\$51	\$52	\$54	\$55	\$57	\$59
Insurance	\$10	\$10	\$11	\$11	\$11	\$12	\$12	\$12	\$13	\$13
Communications	\$2	\$2	\$2	\$2	\$2	\$2	\$2	\$2	\$3	\$3
Advertising	\$20	\$21	\$21	\$22	\$23	\$23	\$24	\$25	\$25	\$26
Misc.	\$3	\$3	\$3	\$3	\$3	\$3	\$3	\$3	\$3	\$3
<b>Total Expenses</b>	\$191	\$196	\$202	\$208	\$215	\$221	\$228	\$234	\$241	\$249
<b>Net Operating Income (Deficit)</b>	(\$145)	(\$127)	(\$120)	(\$95)	(\$66)	(\$63)	(\$65)	(\$46)	(\$49)	(\$53)
Deposit to Maintenance Reserve	\$1	\$2	\$2	\$3	\$4	\$5	\$5	\$6	\$6	\$6
<b>Net Operating Income</b>	(\$146)	(\$129)	(\$122)	(\$98)	(\$70)	(\$67)	(\$70)	(\$52)	(\$55)	(\$59)

What is the likely economic impact from Settler's Hill?

## Summary of Impacts

	20-Years	Stabilized Year
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### Net New Spending

(millions)

Direct	\$11.8	\$0.58
Indirect	\$3.2	\$0.16
Induced	\$3.8	\$0.18
<b>Total</b>	<b>\$18.8</b>	<b>\$0.93</b>

### Net New Earnings

(millions)

From Direct	\$4.5	\$0.22
From Indirect	\$0.3	\$0.01
From Induced	\$0.4	\$0.02
<b>Total</b>	<b>\$5.2</b>	<b>\$0.25</b>

### Net New FTE Jobs

Actual

From Direct	10	10
From Indirect	1	1
From Induced	3	2
<b>Total</b>	<b>13</b>	<b>13</b>

### Construction Impact

(000s)

Total Spending	\$1,506
Direct Labor Spending	\$1,398
Job-Years, Actual	7

Source: Hunden Strategic Partners

## Impact Analysis

- Kane County does not levy any material taxes.
- To the extent municipalities within Kane County are a home rule unit, the municipalities would be positively impacted.

QUESTIONS?