



University of Idaho

FULL REPORT

Idaho Center For Agriculture, Food And The Environment (CAFÉ)

Discovery Center Feasibility Study for the Magic Valley

April 1, 2022

From: **Points Consulting &
ZGA Architects**



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I. Executive Summary

Key Findings

Jerome County is growing rapidly both in terms of population and employment. Between 2010 and 2020 the county's 9.5% growth ranks in the top half of all Idaho counties and in the top 15th percentile of all counties in the nation. Given the U of I's focus on Northern and Southwestern Idaho, those in the Moscow community can lose track of the dramatic changes occurring in Southern Idaho. By way of comparison, the seven counties composing the Magic Valley are 63% larger in population than North Central Idaho's five counties.¹ Their population growth rate has also nearly matched that of Latah County (the location of Moscow), over the past ten years.

More impressively, Jerome County's employment expanded 24% over the past 10-years. Impressive growth in employment and wages, with moderate growth in establishments indicates the existence of numerous large-scale businesses with a long-term interest in investing in the Magic Valley. These growth rates are likely to keep up, buoyed by strong growth among agriculture-based businesses including Hempitecture, Western Dairy Transport, and True West Beef. The region's specialization in both agriculture and value-added food manufacturing is apparent in the employment statistics for both Jerome and Twin Falls Counties. Employment concentration in Agriculture and Manufacturing exceed national per capita averages in both counties, but the 31.01 location quotient in Jerome County's agriculture sector is particularly stunning. Technically speaking, this means that Jerome County has 3,100% more employment in agriculture than would be expected based on national averages.

Jerome County's population is characterized by strong concentration of youth (0 to 14 years) and young adults (30 to 39 years). Over one-quarter of the County's population is in the 0 to 14-years-old age cohort, well exceeding the national average. The Discovery Center's central location would make it accessible to agricultural households not just in Jerome, but across the entire Magic Valley. Interest in agriculture among youth is substantial. Within South Central Idaho's seven counties in 2020/21 there were over 10,000 4H participants and over 5,200 FFA participants. FFA participation in the Magic Valley excels beyond per capita expectations. Though accounting for less than 10% of the state's total population, the region contributes 25% of the state's FFA members.

Tourism will play a central role in the success of the Discovery Center. Jerome County's current tourism industry is marginal, accounting for roughly 4% of all jobs in the County. The Discovery Center's location along the Hwy 93 is strategically positioned to absorb much more tourist foot-traffic and spending to neighboring Blaine County, which earns \$5.3 million in tourist spending per year. Additionally, the contemporaneous development of numerous adjacent assets, and a burgeoning interest in southern Idaho among nearby metros, such as Seattle, Boise, and Salt Lake City, could converge to increase the visitor impact on Jerome County. The Discovery Center would positively contribute to the local economy by paying its

¹ Counties included: Magic Valley: Camas, Cassia, Gooding, Jerome, Lincoln, Minidoka and Twin Falls; North Central: Clearwater, Idaho, Latah, Lewis, and Nez Perce.

staff, increasing local visitors, and purchasing goods and services from other businesses. PC estimates that the Discovery Center would create or support 18 additional jobs in Jerome County, add \$706.2K in labor income, and expand the economic base by \$810.2K.

According to PC's financial analysis, the Discovery Center is likely to come close to covering its costs once fully stabilized (likely between years three and five of operation). The U of I will need to provide considerable support during start-up, amounting to an estimated \$2.13 million in the first five years. The U of I will likely have to cover some ongoing costs after this point, in the range of \$282K/year. At some point, those costs will likely taper off, sometime in the six-to-ten-year time range. That said, if U of I develops popular and recognized products at the Food Innovation Center, that develop a strong retail and e-commerce following, the Discovery Center could end up producing some level of operating surplus for the University.

Provided the U of I can align programming, location and financial investment, the Discovery Center could provide a significant boost to the Jerome County economy and a vital home for agribusiness and agricultural activity in South Central Idaho. All this can be accomplished while increasing U of I's image in the Magic Valley and providing a venue for featuring U of I branded agricultural products.

Recommendations

Based on Points Consulting's Feasibility Study, the Discovery Center concept could be a great fit for both U of I and the Magic Valley. Success hinges on execution, and the following are some factors that U of I should consider in order to ensure success on the project.

- PC recommends the Collocated Option (i.e. the Southern Idaho Legacy Center) as the ideal site for the CAFE Discovery Center. All things considered, the Discovery Center could benefit from the cluster of visitor-oriented attractions to be developed at the site. The project borders on infeasible if developed at the Independent Option location, as it would be competing for attention with the Southern Idaho Legacy Center development. Nevertheless, there are some risk factors that would need to be mitigated to make this arrangement feasible.
- The worst possible fate for the Discovery Center would be for it to be regarded as an agricultural museum. This perception would not result in the requisite community enthusiasm that would make the facility sustainable and an attraction worth visiting repeatedly. Rather, U of I staff should deliberately refer to the DC as an Interpretive Center.
- The moniker of Discovery Center is problematic because of the similarities to the *Discovery Center of Idaho* in downtown Boise. PC recommends U of I consider a name change. Since the Discovery Center is to be the primary visitor location for the whole organization, one option would be to rename the facility the Idaho Center for Agriculture, Food and the Environment (CAFE). If so, the other facilities could be relabeled with secondary titles in association (e.g.: the CAFE Research Dairy, and the CAFE Food Innovation Center).
- Most citizens in Southern Idaho are eager to see the concept brought to fruition. However, because the concept has been under discussion for several years and has undergone several changes, there is also considerable confusion. The community's inbuilt enthusiasm could transform into impatience, and even mistrust, if the U of I

continues to discuss the CAFE and not take action. Once action is taken it is recommended that the U of I work with local partners and local media to clearly define the inter-related aspects of the CAFE. Furthermore, speculative aspects of the plan should not be released to the general public as it would likely devolve into a new round of misperceptions.

- Key stakeholders will have to be willing to invest in the CAFE DC. The existing pro forma includes \$260K/year in donations or sponsorships. Furthermore, the pro forma assumes that all exhibit costs will be borne by sponsoring organizations in exchange for brand awareness. All this is feasible but will require a concerted capital campaign among Magic Valley area agri-businesses.
- Agriculture is a staple of the economy and culture of southern Idaho, perhaps even more so than in northern Idaho. This fact is evidenced by the economic statistics, participation in youth agriculture activities, and recent economic development actions in Jerome and Twin Falls counties. This combination of factors makes the Magic Valley the strategic location for student recruitment and education for the U of I. Though it would take considerable effort and planning, it is worth exploring the establishment of certain ag-related two-year and four-year programs to be taught fully or partially at the CAFE facilities.

II. Report Introduction

The U of I hired Points Consulting (PC) and ZGA Architects (ZGA) to provide an impact and feasibility study related to the University of Idaho CAFE Discovery Center (CAFE DC) in early 2022. Though the U of I has a strong conception of how the three components of the CAFE will function together in South Central Idaho, there are some planning gaps remaining related to CAFE DC which are to be addressed by this analysis, including the following:

- Does the region's economics and demographics support the CAFE DC concept?
- How do current trends related to national, state, and regional tourism impact the CAFE DC?
- What synergies exist with other regional organizations and businesses that could positively impact the CAFE DC and those organizations?
- What would be the management structure and the operational plan of the CAFE DC?
- Among available locational options, what are the costs and benefits and which location would ultimately produce the best outcome?
- How would the CAFE DC function financially in terms of expenses and revenues?
- What economic impact would the CAFE DC generate for Jerome County?
- All factors considered, should the U of I develop the CAFE DC or not?

PC conducted in-depth qualitative and quantitative research in the first several months of 2022 including 21 interviews, an on-site visit, and analysis of hundreds of socioeconomic variables. This report includes chapters organized by topic as follows:

- **III. Market Analysis:** analysis of demographics, economics (particularly related to agriculture), and participation in agricultural ventures and activities
- **IV: Tourism Potential:** analysis of current visitation statistics and patterns to South Central Idaho and how those relate to the CAFE DC's potential
- **V: Operational & Management Plan:** recommendations on staffing, volunteers, board, facility usage and facility use and management
- **VI: Peer Facilities Overview:** Highlights and best practices from other like-kind facilities in the US
- **VII Stakeholder Engagement & Project Background:** summary of community interviews, past related analyses, and literature review
- **VIII: Financial Plan:** A preliminary pro forma for the facility, estimated expenses and revenues, and estimated 10-year investment by the U of I
- **Appendices:** detailed data, maps, site plans, and other GIS materials

Locational Options

The U of I has the option of locating the CAFE DC either at a property that it currently owns or it can exchange that parcel with another property about 3/4ths of a mile south. The university's current property is on American Avenue near the intersection with Highway 93. The second option property is along Democracy Avenue within the Crossroads Point business park.

These two options are referred to regularly in this assessment and will be called the "Collocated" and the "Independent" options, for shorthand. Figure 1 displays the two locations. [Appendix A](#) contains further details on the facility that would fit within the given parcel. [Appendix C](#) demonstrates alternative renderings and site plan information on the two possible sites.

Figure 1: Facility Location Options



III. Market Analysis

Community Background

Jerome County—the county where the proposed center would be located—has seen considerable economic and social changes between 1990 and 2018. The agricultural and manufacturing sectors have both flourished and the county’s population has grown proportionally. Jerome’s economy is largely based on agricultural production and industries related to agriculture, with dairy-processing being the leading industry in the county.² Aiding in the growth of commercial activity in the area is Interstate 84 (I-84), which crosses the southern portion of the county and has facilitated the attraction and growth of several transportation and distribution related businesses.

The City of Jerome’s growth has been so strong it has recently led Jerome mayor, Dave Davis, to highlight housing as a key need to support economic growth. This is despite the significant housing activity currently underway. As cited in Mayor Davis recent State of the City speech, there are 114 lots ready to be built upon, 118 under construction, an additional 572 in planning stages.³ Commercial growth in the area is expected to continue, with companies such as Western Dairy Transport—the biggest liquid foods trucking company in the US—constructing a 200,000 ft² regional headquarters in the city, and Rich Thompson Trucking, who are also building a new facility in the Magic Valley.

The most successful community development projects are typically those for which a need is identified within long-range planning efforts by the host community. Fortunately, in this case, Jerome County’s 2018 Comprehensive Plan mentions that the creation of local recreational and educational activities can help lead to population growth, which can promote and sustain economic development in the area. Anecdotally, among those interviewed by PC in the course of this analysis, a common refrain among young adult residents was a need for “more things to do for families.”

² Jerome County Comprehensive Plan, 2018

³ Lorien Nettleton, “Jerome looks for more housing as growth continues, mayor says.”

https://magicvalley.com/news/local/govt-and-politics/jerome-looks-for-more-housing-as-growth-continues-mayor-says/article_d6aafb8c-efb5-5e75-bd04-5c10cb7729d5.html

Population Factors

Table 1 below shows the change in total population for Jerome County from 2017 to 2020 by city. Jerome is the clear dominant commercial and population capital, and also the only city which saw population growth in the past few years. Jerome County, overall, increased in population by 2.6% over the past three years. Additional Census data also shows that Jerome County grew 9.5% over the past 10-years, placing it in the top 15th percentile among counties in the United States.

Table 1: Jerome County Population Change 2017-2020 by Area

Area	2017 Population	2020 Population	Numerical Change	% Change
Jerome City	11,636	12,349	713	6.1%
Hazelton	809	803	(6)	(0.7%)
Eden	416	393	(23)	(5.5%)
Remainder of Jerome County	10,766	10,692	(74)	(0.7%)
Total	23,791	24,578	787	3.3%

Source: US Census Bureau, DEC Redistricting Data, 2020

Table 2 shows the same data as Table 1 above, but for select cities in Twin Falls County. This county has had a similar growth rate from 2017 to 2020 as Jerome County, with Twin Falls City—the county’s most populous city—seeing a population increase of 9.4%. Kimberly and Buhl also experienced growth in this period, yet the rest of the county outside of these locations saw a slight decrease in population. Additional Census data shows that Twin Falls County is the 6th fastest growing county in Idaho, and Twin Falls City is the 10th fastest growing city in the state.⁴

Table 2: Twin Falls County Population Change 2017-2020 by Area

Area	2017 Population	2020 Population	Numerical Change	% Change
Twin Falls City	47,340	51,807	4,467	9.4%
Kimberly	3,637	4,342	705	19.3%
Buhl	4,285	4,684	399	9.3%
Remainder of County	30,177	27,578	(2,599)	(8.6%)
Total	85,439	88,411	2,972	3.50%

Source: US Census Bureau, DEC Redistricting Data, 2020

Table 3 below compares the changes in population from 2017 to 2020 for Jerome County and Twin Falls County, as well as Idaho state population totals, and US totals. Both Twin Falls County and Jerome County saw similar growth rates of around 3%, with Idaho growing at a rate more than four times higher than the US as a whole. Figure 2 below shows how the state of Idaho, Twin Falls County, and Jerome County’s growth rate has exceeded the growth rate for the US. The chart has 2010 as the base year in order to demonstrate the trend in growth rate from 2010 to 2020. While all four areas represented in the graph have been steadily

⁴ Twin Falls County one of the fastest growing in Idaho, 2022

<https://www.kmvt.com/2022/02/07/twin-falls-county-one-fastest-growing-idaho/>

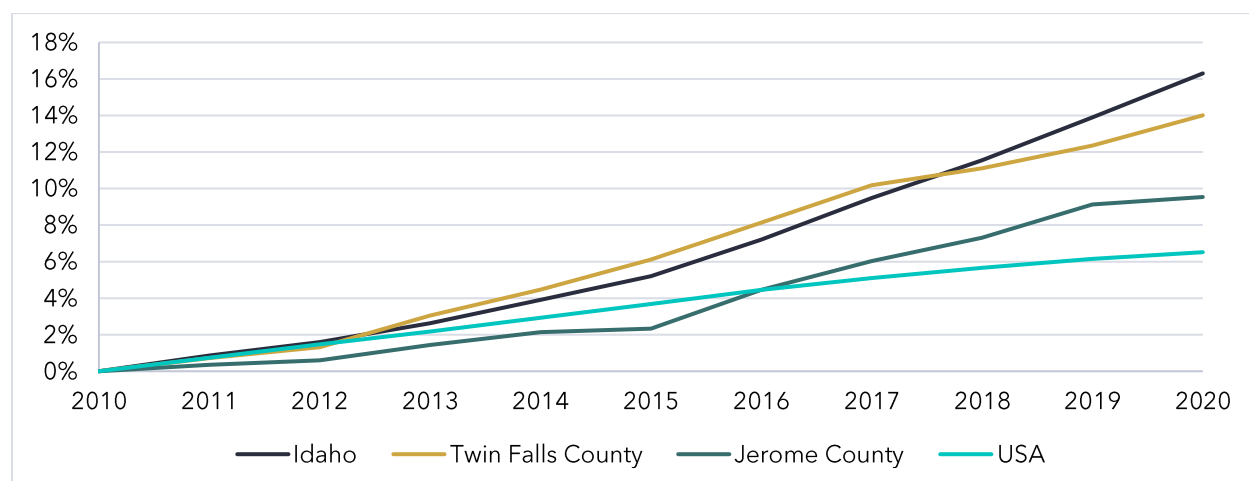
growing, Idaho and the two aforementioned counties have consistently outpaced the US since 2016 in terms of population increase.

Table 3: Jerome County, Twin Falls County, Idaho State Total, and US Total Population Change, 2017-2020

Area	2017 Population	2020 Population	Numerical Change	% Change
Idaho	1,719,745	1,826,913	107,168	6.2%
Twin Falls County	85,439	88,411	2,972	3.5%
Jerome County	23,791	24,578	787	3.3%
USA (Millions)	325.1	329.4	4.4	1.3%

Source: US Census, Annual Population Estimates, 2010-2020

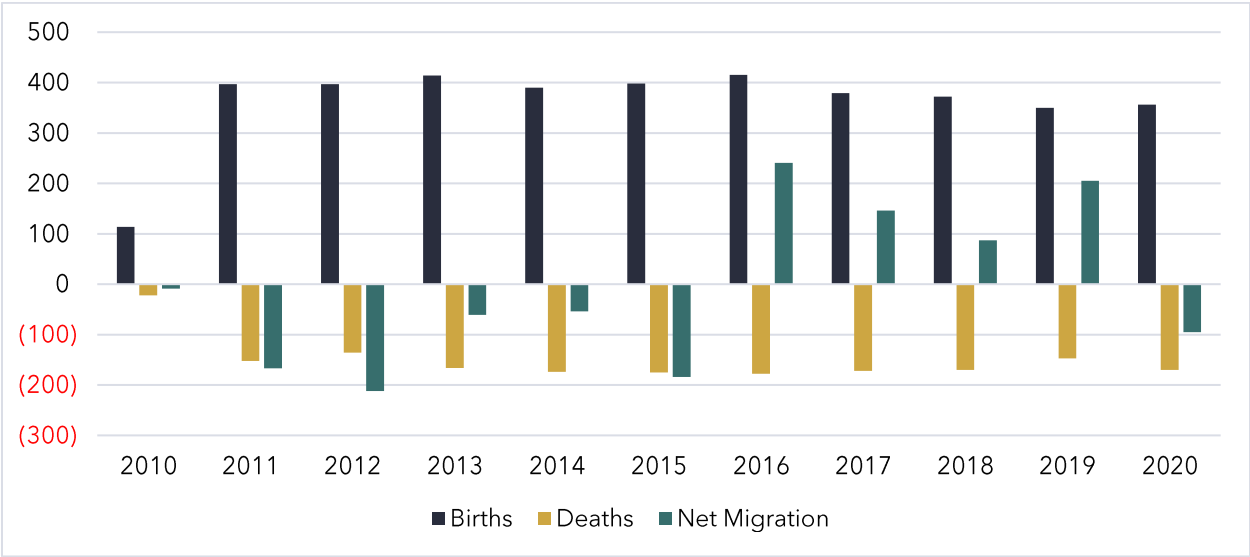
Figure 2: Annual Population Growth Rate for Idaho, Twin Falls County, Jerome County, and US Totals, 2010-2020



Source: US Census, Annual Population Estimates, 2010-2020

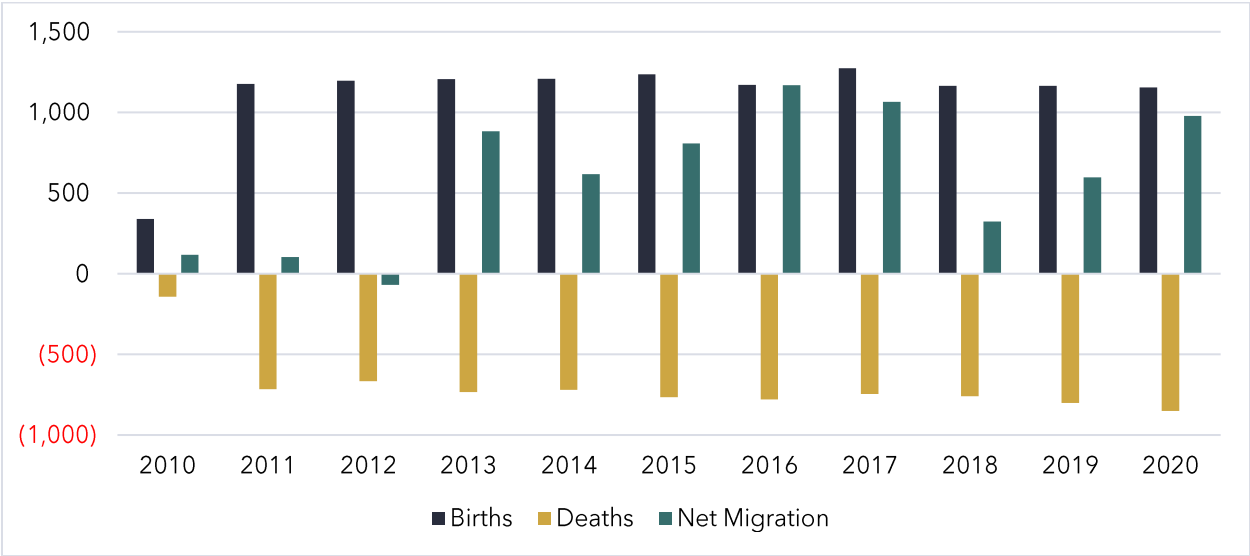
Figures 3 and 4 show a breakdown of the sources of population growth for Jerome County and Twin Falls County. In the case of Jerome County, shown in Figure 3, births have remained consistently higher than deaths from 2010 to 2020, and net migration has been positive since 2016, only seeing a decline in 2020. Twin Falls County has also had higher birth rates than death rates during this period, with a consistently positive rate of net migration since 2013—in many years being almost equal to the birth rate.

Figure 3: Sources of Population Growth in Jerome County, 2010-2020



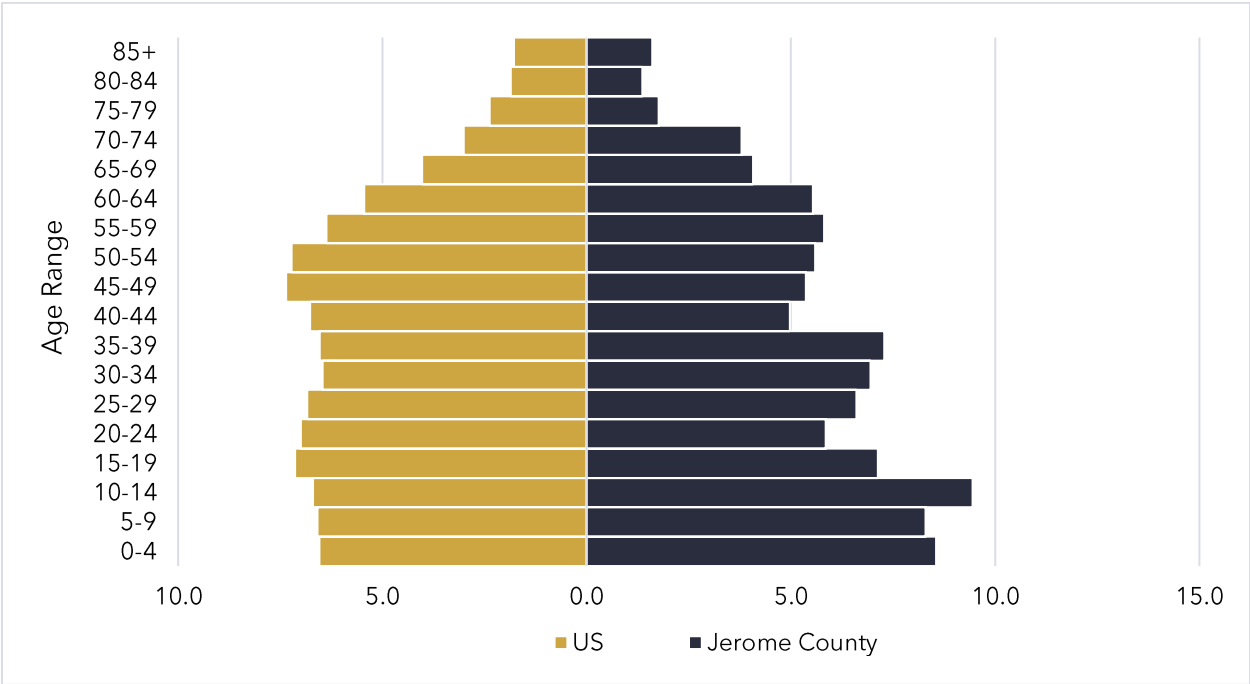
Source: US Census, Annual Population Estimates, 2010-2020

Figure 4: Sources of Population Growth in Twin Falls County, 2010-2020



Source: US Census, Annual Population Estimates, 2010-2020

Figure 5: Jerome County vs US Total Population by Age Range



Source: US Census Bureau, DEC Redistricting Data, 2020

Figure 5 shows the distribution of population by age cohort, comparing Jerome County to the United States. In a nation desperate for more youth and working-age professionals these are genuine assets for the economic future of the county. The young adults with younger children demographic is also a key target demographic for repeat visitors to the CAFE DC.

As evidenced in the difference between the bars, Jerome County excels in the key population cohorts of 0 to 14 years, and 30 to 39 years. Those aged 0 to 14 compose 26.3% of the county’s population, compared to just 19.8% in the United States. The 30 to 39 years’ group composes 14.2% of the population, compared to 13.0% in the United States. This is important as the primary users of the facility are expected to be families with children and those seeking educational opportunities. Regardless of the final location, the University is well positioned to increase its visibility and likelihood of being regarded as a power player in Agricultural Education in Idaho and the west as Magic Valley families look to the UI for potential career opportunities and post-secondary education.

Table 4 below shows these changes in population for the five- to 17-year-old cohort for each county in South-Central Idaho, as well as the totals for the state of Idaho and the US. Jerome County and nearby Twin Falls County have both seen surges in their 5 to 17-year-old populations in recent years, while the US has seen the numbers for this cohort slightly decrease. This cohort expanded by 2,615 persons in Twin Falls County, equivalent to a 17.4% increase, while the same group grew by 595 persons in Jerome County, for a 12.2% increase. These two counties saw the largest increment for this sector of the population in the span between 2011-2019. Others also saw increases, but to a lesser extent, while both Gooding and Lincoln saw decreases.

Table 4: Population Ages 5-17 for Counties in South-Central Idaho, Idaho Totals, and US Totals

County	2011 Population	2019 Population	Numerical Change	% Change
Twin Falls	14,995	17,610	2615	17.4%
Cassia	5,486	5,654	168	3.1%
Jerome	4,860	5,455	595	12.2%
Minidoka	4,157	4,403	246	5.9%
Gooding	3,282	3,032	(250)	(7.6%)
Lincoln	1,201	1,127	(74)	(6.2%)
Camas	194	202	8	4.1%
South-Central Idaho	34,175	37,483	3,308	9.7%
Idaho	309,372	332,001	22629	7.3%
US (Millions)	53.8	53.5	(0.3)	(0.5%)

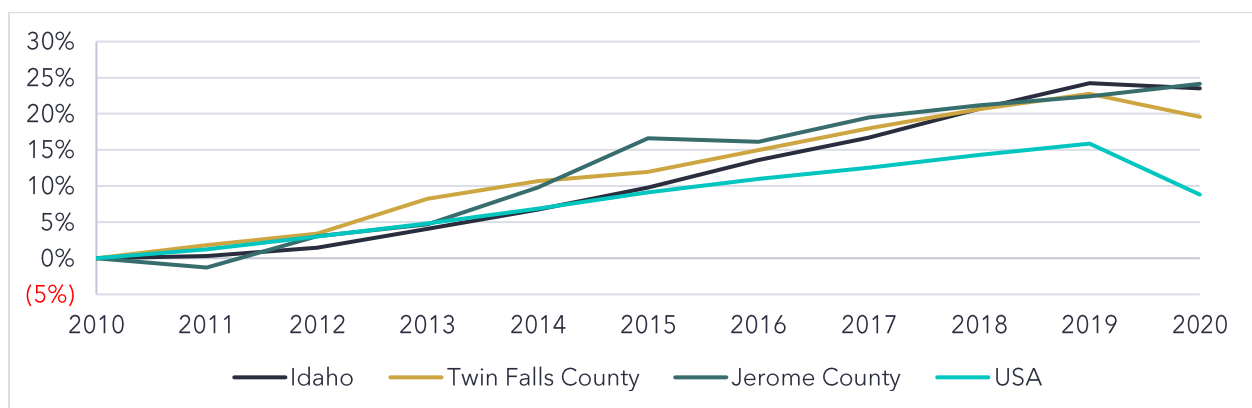
Source: US Census, Annual Population Estimates, 2011-2019

Economic Factors

Jerome County and Twin Falls County have not only grown in terms of population, but they have both seen robust economic growth and development throughout the years. Figure 6 below shows how the growth rate for employment in these counties has outpaced the US rate since 2015.

The state of Idaho as a whole has grown at a faster rate than the rest of the nation. In fact, according to Idaho's Department of Labor, Idaho was the first state to return to pre-pandemic job levels.⁵ Figure 6 demonstrates how 2020's adverse impact on jobs was not as severe in Idaho, Jerome County, and Twin Falls County, when compared to the rest of the US.

Figure 6: Annual Employment Growth Rate for Idaho, Twin Falls County, Jerome County, and US Totals, 2010-2020



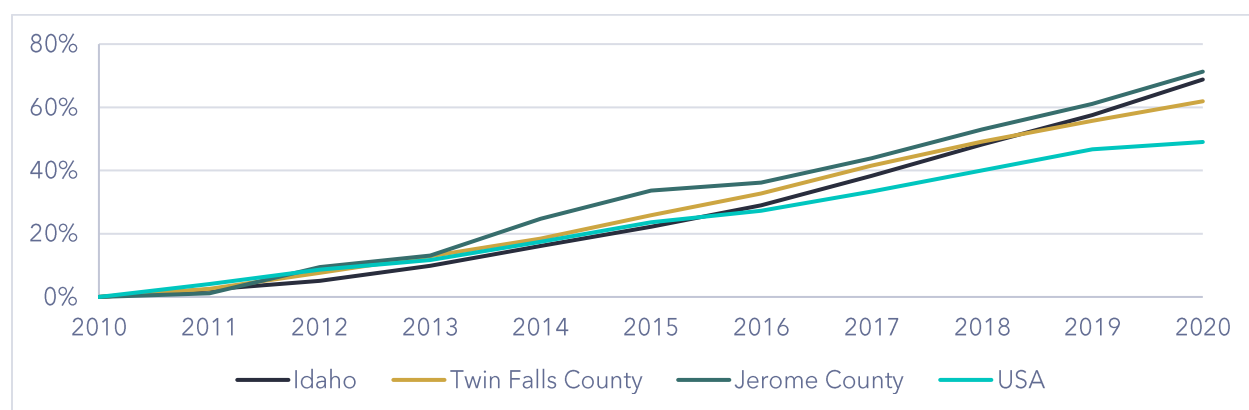
Source: US Bureau of Labor Statistics, Quarterly Census of Employment and Wages, 2010-2020

⁵ Idaho is among the nation's job growth leaders

<https://www.boisestatepublicradio.org/economy/2022-01-07/idaho-is-among-the-nations-job-growth-leaders-but-its-not-all-rosy>

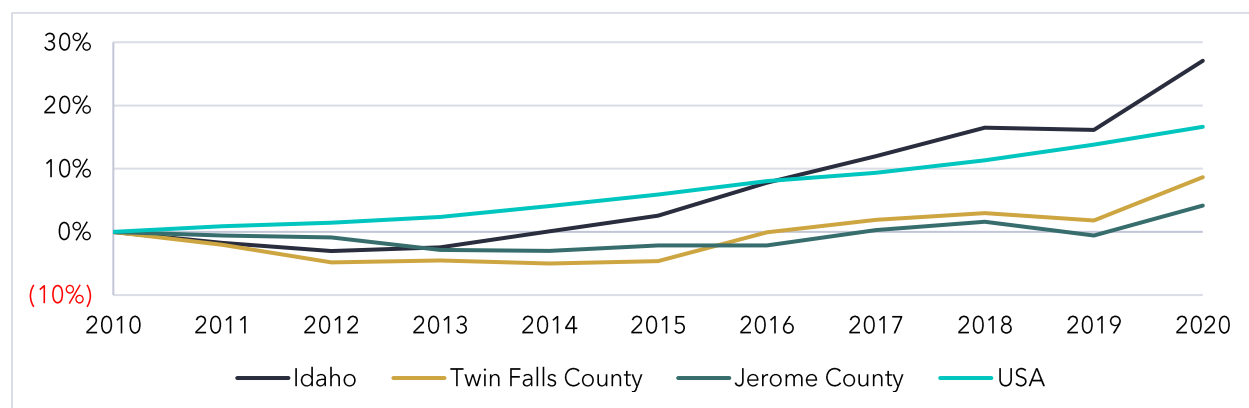
Figure 7 below shows the growth rate for wages in Idaho, Jerome County, Twin Falls County, and the US. Similar to the case of employment above Jerome County and Twin Falls County have experienced more wage growth than the US since around 2015. Idaho, on the other hand, has outpaced the US in this metric since 2013. Figure 8 shows the growth rate for establishments for these same regions. In this case Jerome County and Twin Falls County have not grown at the same rate as the US. The information from the preceding figures is summarized in Figure 9, which combines the comparisons for growth rates in wages, establishments, and employment in these regions.

Figure 7: Annual Wage Growth Rate for Idaho, Twin Falls County, Jerome County, and US Totals, 2010-2020



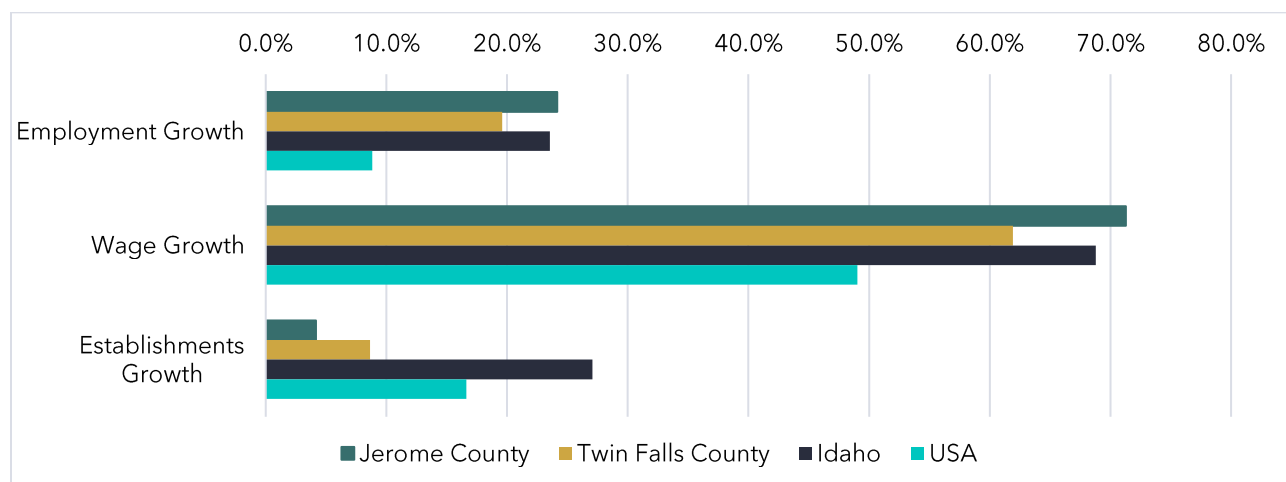
Source: US Bureau of Labor Statistics, Quarterly Census of Employment and Wages, 2010-2020

Figure 8: Annual Establishment Growth Rate for Idaho, Twin Falls County, Jerome County, and US Totals, 2010-2020



Source: US Bureau of Labor Statistics, Quarterly Census of Employment and Wages, 2010-2020

Figure 9: Comparison of Annual Establishment, Wage, and Employment Growth Rates for Idaho, Twin Falls County, Jerome County, and US Totals, 2010-2020



Source: US Bureau of Labor Statistics, Quarterly Census of Employment and Wages, 2010-2020

The fact that both Jerome County and Twin Falls County have shown an increased rate of wage growth when compared to the US, but a relatively lower number of establishments to go along with that increment, may be indicative of the existence of many large-scale businesses with a long-term interest in investing in the Magic Valley. The region's specialization in both agriculture and value-added food manufacturing is apparent in the employment data for these industries in both Jerome and Twin Falls Counties.

Agriculture and value-added food manufacturing are some of the leading employment sectors in these counties, with these counties' employment numbers surpassing the per capita averages in the US. Tables 5B and 6B in [Appendix B](#) show the employment for various sectors in Jerome County and Twin Falls County, respectively. The tables also show how the employment numbers for these counties have changed from 2010 to 2020, along with the location quotient (LQ) for each job sector. Jerome County's 31.01 LQ in the agriculture sector particularly stands out. Technically speaking, this means that Jerome County has 3,100% more employment in agriculture than would be expected based on national averages.

Youth Agriculture Participation

Youth participation in agricultural clubs and activities is a strong indicator both for the future of the agriculture industry in the region, and for potential visitations and usage of the CAFE DC. In this case, data for the entire Magic Valley is warranted. Sitting at the intersection of Hwy 93 and I-84 there is no more centralized location for students from across the region to visit for meetings, activities, and demonstrations. This series examines both 4H and FFA participation. 4H is open to students ages five to 18 and FFA to all high school aged students.

Figure 10 displays a timeline of 4H participants for each county in South Central Idaho between 2011 and 2021. Figure 11 displays the number of youth participants per 1,000 youth in the 5- to 18-year-old age cohort (the primary market for 4H participants). These data are based on 2019 participation because 2020-2021 participation was heavily affected by

COVID and departed from historic trend-lines. Prior to 2020 it appeared that all communities were on either a stable or an upward growth trend in participation.

Examining the period between 2011 and 2019, participation increased in all counties with the exception of one (Lincoln). As a region, 4H participation expanded from roughly 4,700 in 2011 to roughly 10,400 in 2019. Growth was particularly noteworthy in Cassia and Twin Falls County which increased by over 3,500 and 1,300, respectively. In terms of per capita participation, Camas, Cassia and Gooding led the region. Surprisingly, Jerome was lowest among counties with 74 participants of every 1,000 youth. As a region, South Central Idaho exceeded the state of Idaho's participation (203 compared to 171 participants per 1,000 youth.)

Another notable segment correlated to the increase in population particularly within Jerome County are Hispanic residents. According to the Jerome County Comprehensive Plan⁶ between 1990 and 2018 the total percentage of Hispanic residents increased from 6.3% to 34.5% and based on 2020 Census data, those identifying as Hispanic or Latino currently make up 37% of residents in Jerome.⁷ This is also important to note because the increase in Hispanic and Latino growth relates to the parallel growth of the dairy, agriculture, and manufacturing industries in Jerome where many employees are of Hispanic origin.

FFA participation was similar strong in the Magic Valley over the past nine years, as shown in Figure 12. Notably, the number of participants at 22 local high schools was equivalent to roughly 26% of the state's total FFA participants⁸, despite the region accounting for just 10% of the state's population. Though participation for the state appeared to be trending up more than the Magic Valley for the years 2015/16 through 2019/20, both the state and the Magic Valley ended the period with similar compound annual growth rates (CAGR) of 4.5% and 4.9%, respectively. It is also worth noting that some of the smaller communities in the region have the strongest participation rates in FFA. Declo, Minico and Filer, for example, are all in host communities with populations below 6,000 but which have over 100 FFA participants in an average year.

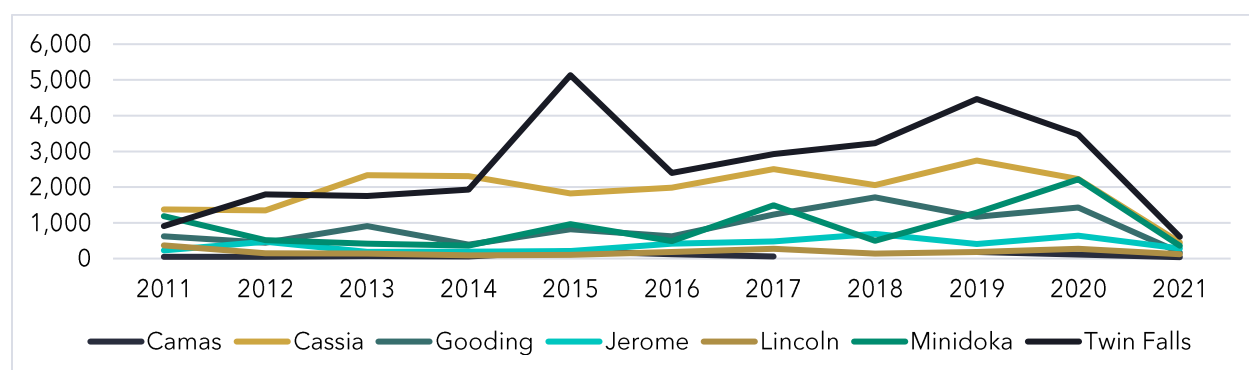
⁶ Jerome County Comprehensive Plan, 2018

<https://www.jeromecountyid.us/DocumentCenter/View/535/Chapter-4---Population>

⁷ ACS 5 Year Estimates Data Profiles, DP05 ACS Demographic and Housing Estimates, 2020

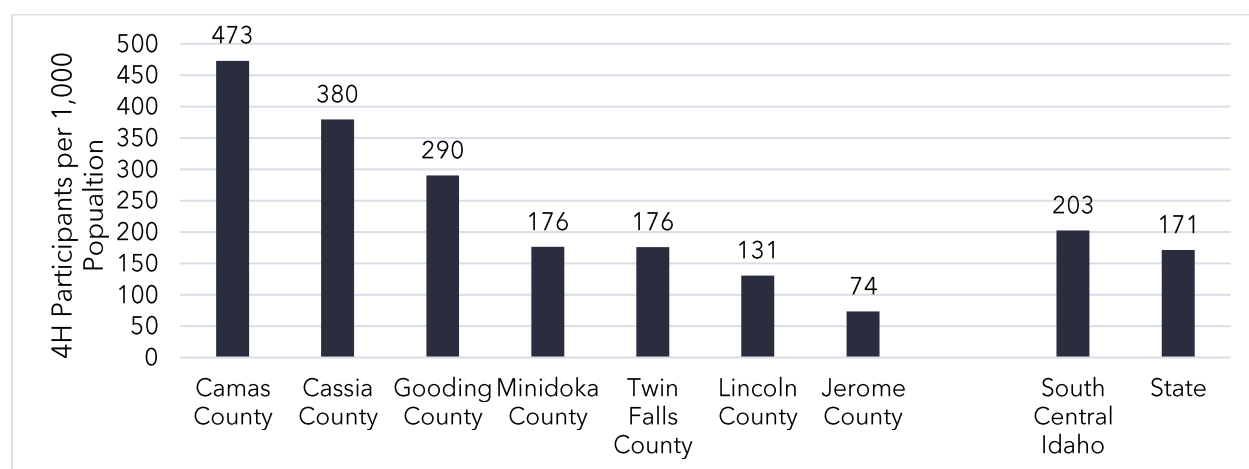
⁸ High schools included in the grouping include Burley, Declo, Minico, Filer, Kimberly, Camas County, Raft River, Jerome, Gooding, Castleford, Murtaugh, Oakley, Hagerman, Twin Falls, Richfield, Hansen, Shoshone, Wendell, Buhl, Cassia, Dietrich, and Bliss.

Figure 10: 4-H Participation by South-Central Idaho Counties



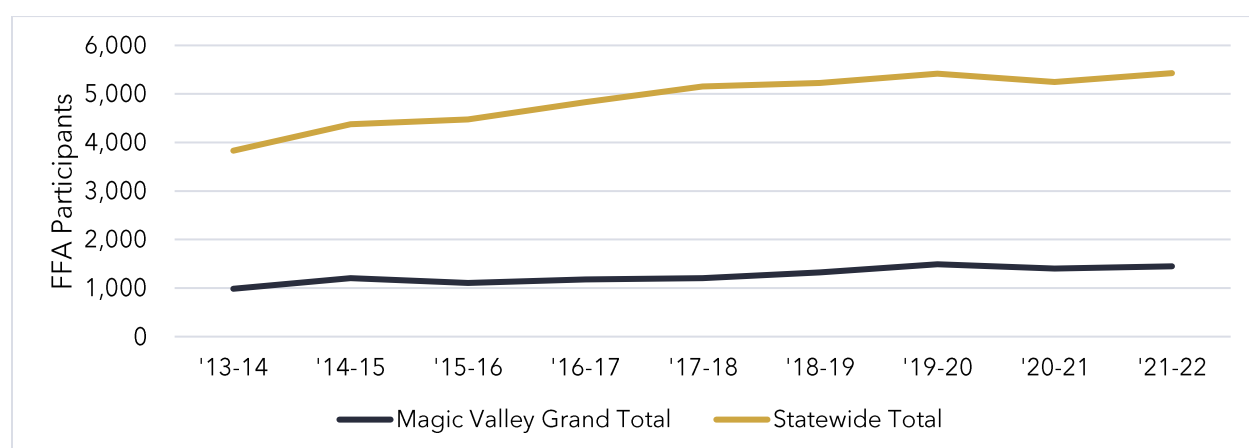
Source: College of Agricultural and Life Sciences, University of Idaho

Figure 11: 4-H Participation by Per 1,000 5-18 Year Olds, South-Central Idaho Counties



Source: Points Consulting using data from CALS, University of Idaho

Figure 12: FFA Participation Magic Valley and Idaho, 2013/14- 2021/22

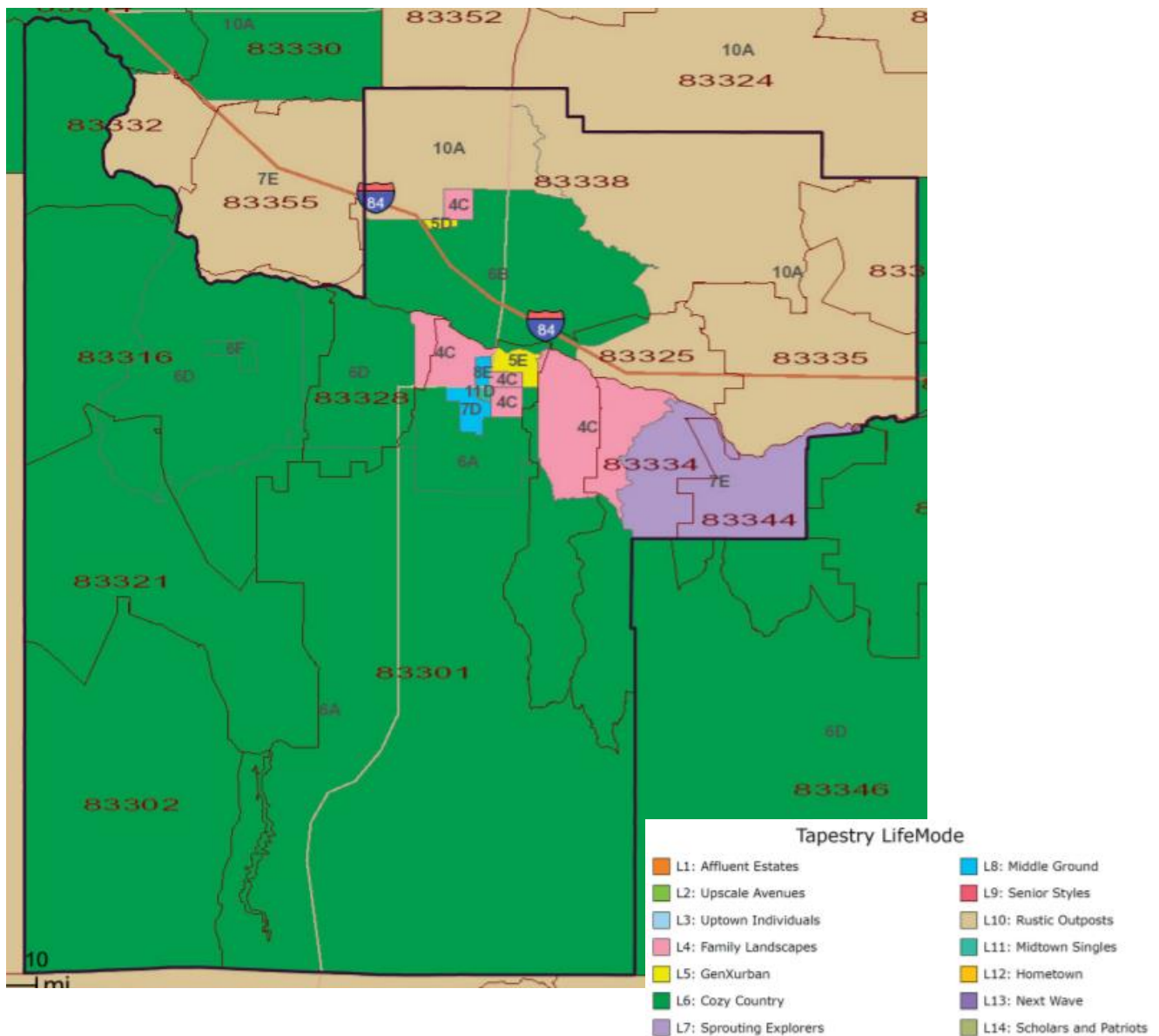


Source: FFA via University of Idaho CALS

Tapestry Segmentation

PC's data vendor Esri provides an analysis of "tapestry segmentation" that examines variations and classifies Market Areas into 67 unique psychographic groups (or segments) with similar values and behaviors. The objective of segmenting the population in this way is to break them down into groups that are generally similar in terms of lifestyle choices, spending habits, and leisure activities. The tapestry titles are helpful shorthand for each group's common traits, but further detail on these groups' common characteristics is often helpful, which is why PC provides more detailed demographics on each of the segmentation groups highlighted in this section. Figure 13 displays a map of Jerome County and Twin Falls County with LifeModes indicated by neighborhood.

Figure 13: Tapestry Segmentation LifeModes



The five dominant tapestry segments in these two counties are Middleburg, Prairie Living, Front Porches, Rustbelt Traditions, and Set to Impress. The following table presents the top five groups for these counties along with the proportion of these segments of the population in the US as a whole.

Table 5: Tapestry Segmentation in Jerome County and Twin Falls County, and United States

Rank	Tapestry Segments	Jerome County and Twin Falls County		United States	
		Percent of Households	Cumulative Percent of Households	Percent of Households	Cumulative Percent of Households
1	Middleburg	22.1%	22.1%	3.0%	3.0%
2	Prairie Living	10.3%	32.4%	1.1%	4.0%
3	Front Porches	7.3%	39.6%	1.6%	5.6%
4	Rustbelt Traditions	6.7%	46.4%	2.2%	7.8%
5	Set to Impress	6.5%	52.8%	1.4%	9.2%

Source: Points Consulting & Esri Business Analyst

To provide more detail on the characteristics of the five market segments, the following table contains selected income, age, household size, wealth, and socioeconomic status information for the five segments.

Table 6: National-Level Characteristics of Jerome County and Twin Falls County Area Tapestry Segments

Rank	Tapestry Segments	Median Household Income	Median Age	Avg. Household Size	Wealth Index	Socioeconomic Status Index
1	Middleburg	\$59,800	36.1	2.75	86	106
2	Prairie Living	\$54,300	44.4	2.51	91	118
3	Front Porches	\$43,700	34.9	2.57	47	81
4	Rustbelt Traditions	\$51,800	39.0	2.47	70	97
5	Set to Impress	\$32,800	33.9	2.12	34	75

Source: Points Consulting & Esri Business Analyst

These five segments compose 52.8% of the region's households and 9.2% of households in the United States. This demonstrates that these counties are mainly composed of middle-aged and young people living in rural and semi-rural areas with a median household income similar to the national average, with the exception of the Set to Impress segment.⁹ The largest population segment, Middleburg, contains many young couples with children who prefer spending on family-oriented entertainment. In fact, the top three segments tend to have

⁹ Income and Poverty in the United States: 2020

[https://www.census.gov/library/publications/2021/demo/p60-273.html#:~:text=Median%20household%20income%20was%20%2467%2C521,and%20Table%20A%2D1\).](https://www.census.gov/library/publications/2021/demo/p60-273.html#:~:text=Median%20household%20income%20was%20%2467%2C521,and%20Table%20A%2D1).)

children, hence the average household size of more than 2.5. This tapestry map further illustrates the prevalence of young households with children and indicates a population that is oriented towards rural living and agriculture in this region.

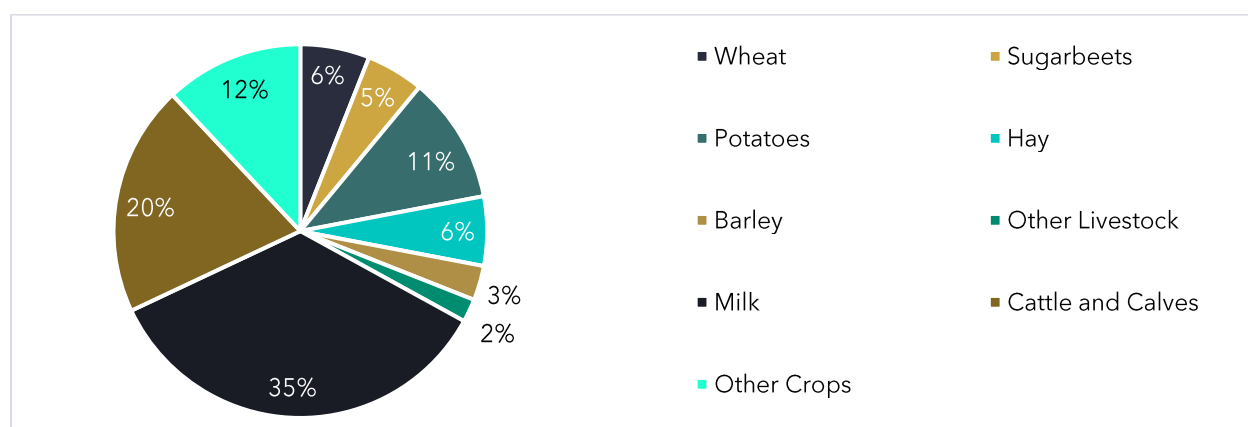
Agricultural Industry

Before analyzing production and agricultural specialization for Jerome County and the Magic Valley, it is imperative to outline the key role that agriculture plays in Idaho and the United States.

Agricultural Economy in Idaho

Agriculture is an integral part of Idaho's economic output. The state is the fifth largest agricultural state when measured by agricultural GDP as a percentage of state GDP.¹⁰ Figure 14 presents a breakdown of the distribution of cash receipts across several agricultural sectors for the year 2021 in Idaho.

Figure 14: Idaho Agricultural Cash Receipts by Sector, 2021



Source: *Financial Condition of Idaho Agriculture, 2021*, University of Idaho

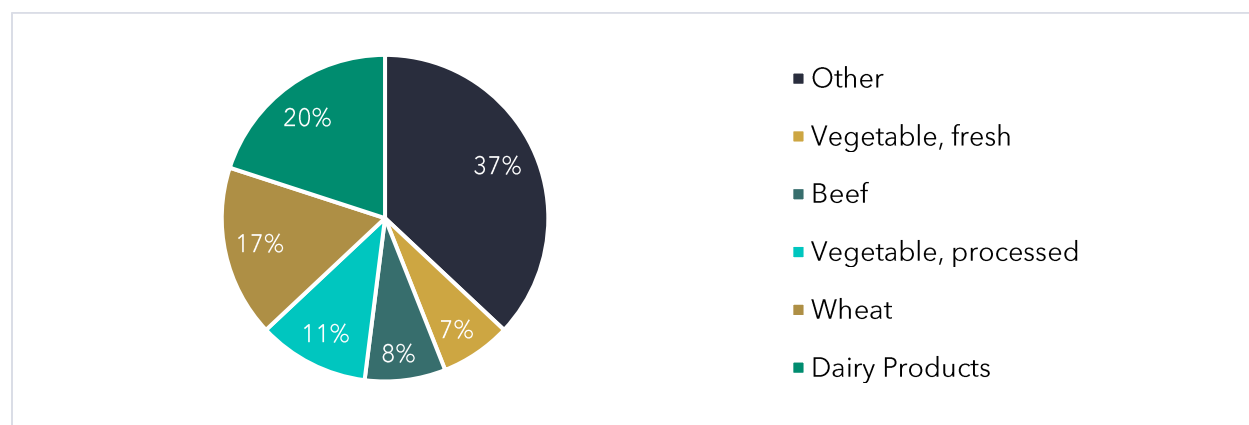
Wheat led in 2021, making up a large portion of Idaho's record high \$8.8 billion in agricultural cash receipts. Cattle and calves, other crops, and potatoes also accounted for a considerable amount of the state's economic output. These receipts represent a 9% increase compared to the previous year, where farm receipts totaled \$8.1 billion. In fact, the state ranked first in terms of sales for potatoes, beets, hay, and cattle and calves in 2021. Idaho has seen better growth rates on average than US totals in terms of cash receipts—only experiencing a reduction of 0.44% in 2020, compared to the US who saw a 2.16% reduction. The state had record high agricultural exports of \$2.32 billion when combining plant and animal products in the year 2020.¹¹ Figure 15 below shows the share of exports by product in 2020, whereas figure 16 shows the trends for farm receipt growth rates for both Idaho and the US from 2009 to 2020, in 2022 dollars.

¹⁰ Rita Du, Ben Eborn, and Garth Taylor, *Financial Condition of Idaho Agriculture, 2021*

¹¹ Sean Ellis, Idaho ag export value in record territory

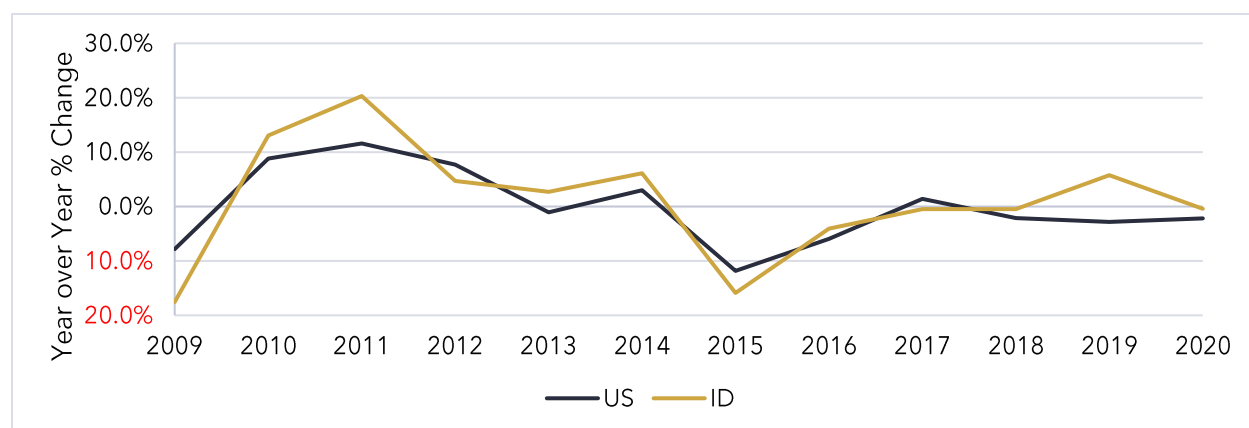
[https://www.idahofb.org/news-room/posts/idaho-ag-export-value-in-record-territory/#:~:text=Exports%20of%20beef%20and%20veal,product%20exports%20totalled%20\\$24754%20million.](https://www.idahofb.org/news-room/posts/idaho-ag-export-value-in-record-territory/#:~:text=Exports%20of%20beef%20and%20veal,product%20exports%20totalled%20$24754%20million.)

Figure 15: Idaho Agricultural Export Share, 2020



Source: Financial Condition of Idaho Agriculture, 2021, University of Idaho

Figure 16: Year-Over-Year Growth Rates for Agricultural Cash Receipts in ID and the US, 2009-2020



Source: USDA, Economic Research Service, 2020

In terms of net farm income, Idaho experienced a 38% increase from 2019 to 2020.¹² This means that net farm income for the state was \$978 million above the previous year's record, with a figure of \$3.5 billion. This record amount would have still been possible without government payments, which were around 40% of net farm income for the US. However, government payments still composed 18% of Idaho's net farm income in 2020. This amount dropped for 2021 by over 40%, along with an 8% decrease in net farm income.

¹² Ben Eborn and Garth Taylor, The Financial Condition of Idaho Agriculture: 2020 <https://www.uidaho.edu/-/media/UIDaho-Responsive/Files/cals/programs/idaho-agbiz/publications/2020-financial-condition-of-ag.pdf?la=en&hash=A71D0541BE3EA5BFAE91C54C6034165BBD94ADD7>

Table 7: Idaho Net Farm Income (\$ Millions), 2011-2020

Income Statement	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Revenues	\$8,171	\$8,587	\$8,758	\$9,395	\$8,420	\$7,934	\$8,153	\$8,354	\$8,753	\$9,628
Expenses	\$5,922	\$6,634	\$6,726	\$7,374	\$6,517	\$6,129	\$6,851	\$6,587	\$6,203	\$6,101
Net Farm Income	\$2,250	\$1,953	\$2,032	\$2,020	\$1,903	\$1,805	\$1,302	\$1,767	\$2,550	\$3,527

Source: *The Financial Condition of Idaho Agriculture: 2020*, University of Idaho

Agricultural Economy in South Central Idaho

Southern Idaho in particular is the location of some of the biggest food processors in the world. Producers such as Chobani, Clif Bar, and Glanbia Nutritionals call the Magic Valley home. This part of Idaho leads the state in the field of agribusiness, making up almost half of the state's agriculture receipts.¹³ Also known as The Magic Valley, the region earned the prestigious Federal Manufacturing Community Designation in 2015. The combination of rich, productive farmlands with a centralized location where truck routes to the rest of the western US are only one or two days away, give the Magic Valley a productive edge in agriculture. Southern Idaho is a national top five producer for several cross-industry foods, such as commercial trout and potatoes, barley and sugar beets, cheese and milk, dry edible beans, and spring wheat.

The diversity of Jerome and Twin Falls County's agricultural productivity is on display in Figures 17 and 18 and Tables 8,9 and 10. In percentage terms, Jerome County composes the highest proportion of Cattle, Barley and Wheat. Twin Falls County excels in Beans, Barley, and Hay. Lastly, Table 11 contains some statistics on level of output from producers under age 35. These statistics are in keeping with the unusually young demographics for the region, and once again a promising leading indicator for the future of agriculture in the Magic Valley. The 281 ag operations in Jerome and Twin Falls County compose 8.9% of the state's total, and the 413 ag producers compose 9.4% of the state's total. For comparison, these two counties compose 6.2% of the state's overall population.

These metrics indicate the vast number of agricultural production options available to feature when creating exhibits for the CAFE DC.

¹³ Madeleine Smith, *Southern Idaho's Agribusiness Advantage: The Right People, Location and Product*

Table 8: Net Farm Income for Jerome County and Idaho County Compared to Idaho Totals, 2017 (\$K)

Revenues	Jerome County	% of State	Twin Falls County	% of State	Idaho (\$K)
Livestock Sales	\$518,440	11.9%	\$511,567	11.7%	\$4,374,000
Crop Sales	\$121,144	4.1%	\$168,671	5.7%	\$2,959,000
Government Payments	\$3,187	2.0%	\$6,430	4.0%	\$162,000
Net Farm Income	\$95,515	7.3%	\$144,928	11.1%	\$1,302,000

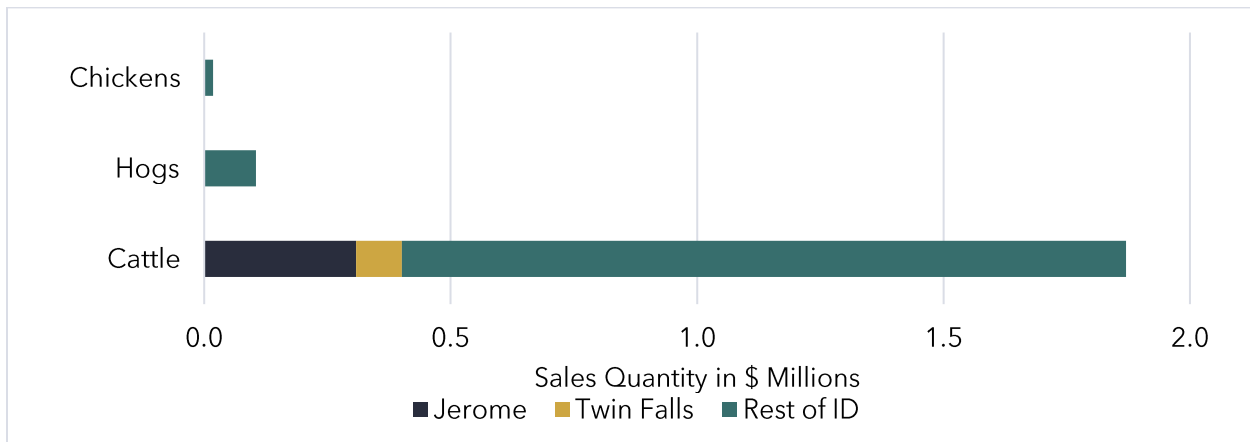
Source: USDA Census of Agriculture, 2017

Table 9: Sales Quantity of Cattle, Hogs, and Chickens in Jerome County and Twin Falls County Compared to Idaho Totals

Commodity Sales	Jerome	% of State	Twin Falls	% of State	Idaho
Cattle	\$308,434	16.5%	\$92,588	4.9%	\$1,870,607
Hogs	\$89	0.1%	\$16	0.0%	\$105,161
Chickens	\$110	0.6%	\$718	4.0%	\$17,852

Source: United States Department of Agriculture, National Agricultural Statistics Service, 2017

Figure 17: Sales Quantity of Animal Products in in Jerome County and Twin Falls County Compared to the Rest of Idaho



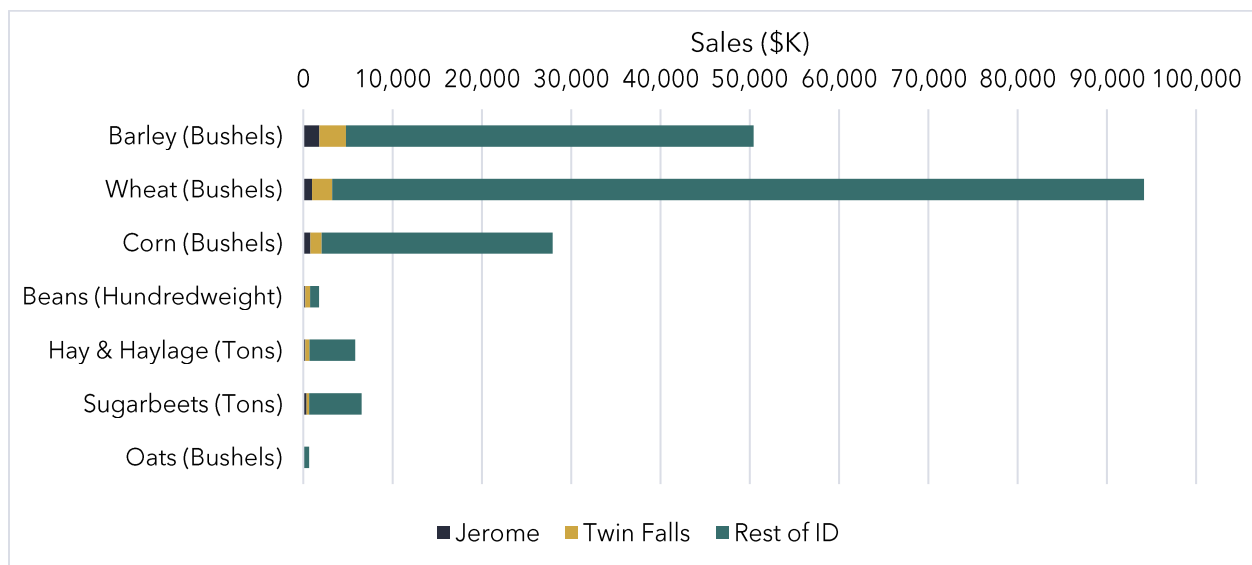
Source: United States Department of Agriculture, National Agricultural Statistics Service, 2017

Table 10: Sales Quantity of Agricultural Commodities in Jerome County and Twin Falls County Compared to Idaho Totals

Commodity	Jerome	% of State	Twin Falls	% of State	Idaho
Barley (Bushels)	\$1,803.1	3.6%	\$2,983.6	5.9%	\$50,452.1
Wheat (Bushels)	\$993.3	1.1%	\$2,254.4	2.4%	\$94,183.3
Corn (Bushels)	\$815.2	2.9%	\$1,223.9	4.4%	\$27,925.8
Beans (Hundredweight)	\$234.4	13.3%	\$545.3	31.0%	\$1,757.8
Hay & Haylage (Tons)	\$225.1	3.9%	\$455.4	7.8%	\$5,833.2
Sugarbeets (Tons)	\$362.0	5.6%	\$290.1	4.4%	\$6,521.8
Oats (Bushels)	--	--	\$13.1	2.0%	\$661.3

Source: United States Department of Agriculture, National Agricultural Statistics Service, 2017

Figure 18: Sales Quantity of Agricultural Commodities in Jerome County and Twin Falls County Compared to the Rest of Idaho



Source: United States Department of Agriculture, National Agricultural Statistics Service, 2017

Table 11: Producers under 35 Years of Age in Jerome County and Twin Falls County Compared to Idaho Totals

Category	Jerome	% of State	Twin Falls	% of State	Idaho
Number of Operations	67	2.1%	214	6.8%	3,135
Number of Producers	94	2.1%	319	7.3%	4,386
Acres of Producers	31,905	1.4%	82,145	3.7%	2,227,694

Source: United States Department of Agriculture, National Agricultural Statistics Service, 2017

Site Specifics

Within this section, PC outlines the specific opportunities, costs, and benefits of the two site options. Information related to zoning, utilities, site footprint, and costs are from ZGA, while traffic patterns and site recommendations are from Points Consulting.

Site Comparisons

ZGA considered the legal, infrastructure, utilities, and zoning differences between the Independent and Collocate Sites. That information is summarized below.

Table 12: Square Footage Comparison of Collocated Site vs. Independent Site

Component	Independent Site	Collocated Site
Site	6.11 Acres	6.61 Acres
Parking	142 Cars, 10 Bus / Tractor, Trailer	122 Cars, 6 Bus / Tractor, Trailer
Main Facility	40,375 SF initial <u>12,712 SF future</u> 53,087 SF full build-out	40,375 SF full build-out
Children's Play Area	2,770 SF	N/A
Classroom/Laboratory	13,217 SF initial <u>6,551 SF future</u> 19,723 SF full build-out	21,283 SF full build-out
Dormitory	2,812 SF initial <u>5,624 SF future</u> 8,436 SF full build-out	6,738 SF full build-out

Source: ZGA Architects

Although both sites appear quite similar in terms of size, there are a few key differences. The Collocated Site is a ½ acre larger than the Independent Site but accommodates fewer parking spaces for both cars and buses (142 vs. 122 cars, 10 vs. 6 buses). The Collocated Site includes more square footage in classroom and laboratory space (19,723 vs. 21,283 sq. ft) but does not permit adequate space for the 2,770 sq. ft. Children's Play Area.

Table 13: Utilities Comparison

Utilities	Independent Site	Collocated Site
Water	Available (City of Jerome)	Available (City of Jerome)
Sewer	Available at street (City of Jerome)	Available at street (City of Jerome)
Natural Gas	Available (Intermountain Gas)	Available (Intermountain Gas)
Electrical	On site (Idaho Power)	On site (Idaho Power)
Communications	On site (broadband internet)	On site (broadband internet)
Fire Hydrant	2 on site	1 available across street

Source: ZGA Architects

In comparing the availability of local utilities both sites have comparable access to all necessary utilities with one notable difference. The Collocated Site has direct access to only one fire hydrant, which is across the street. ZGA would need to work with the appropriate fire district within Jerome to determine if additional access is required. Both sites have electrical and telecommunications already on-site, water and sewer are available from the City of Jerome, and natural gas is available from Intermountain Gas company.

Zoning & CCR's

Both sites are in the city limits of Jerome and subject to the same city zoning including additional Covenants, Conditions and Restrictions (CCRs) due to the sites' location within the Crossroads Pointe Business Park. They are both considered Impact Zone Commercial or IMP-COM. According to Jerome City Code uses within this designation must be "clean, quiet, and free of hazardous or objectionable elements such as noise, odor, dust, smoke, or glare."

Due to the sites' location along Highway 93 the enhancement of highway corridors and entrances into the community needs to be considered through strict signage standards, landscaping design, lighting, and parking standards. Special use permits will need to be obtained for agricultural activities, educational and exhibition spaces, special events, bus and truck parking, and dormitory/residential use of the space. Although the Collocated Site doesn't currently have any space designated for parks and playground, the current zoning would allow for this type of activity in the future. Some additional applicable regulations related to IMP-COM zones are listed below:

- The maximum building height is 35' (not including non-habitable areas)
- Minimum setbacks of 10' on all sides

Per zoning regulations, both sites will require off-street parking. The minimum amount of parking spaces is determined by the designated zoning type, square footage, and occupancy. As detailed in Table 12, the Independent Site will have a total of 142 standard parking spaces while the Collocated Site will have 122 standard spaces. A summary of the number of spaces/per use type for the Independent location is included below and a detailed table of how these numbers were determined can be found in Table 2B of [Appendix B](#). The same calculations can be applied to the Collocated Site to extrapolate spaces per use type.

- Museum/Gallery = 29 spaces
- Auditorium = 59 spaces
- Retail = 9 spaces
- Office = 4 spaces
- Laboratory = 36 spaces
- Dormitory = 4 spaces

Should the U of I decide to proceed with construction at either site, all plans will require design review and approval by the Crossroads Point Business Center Design Review Committee.

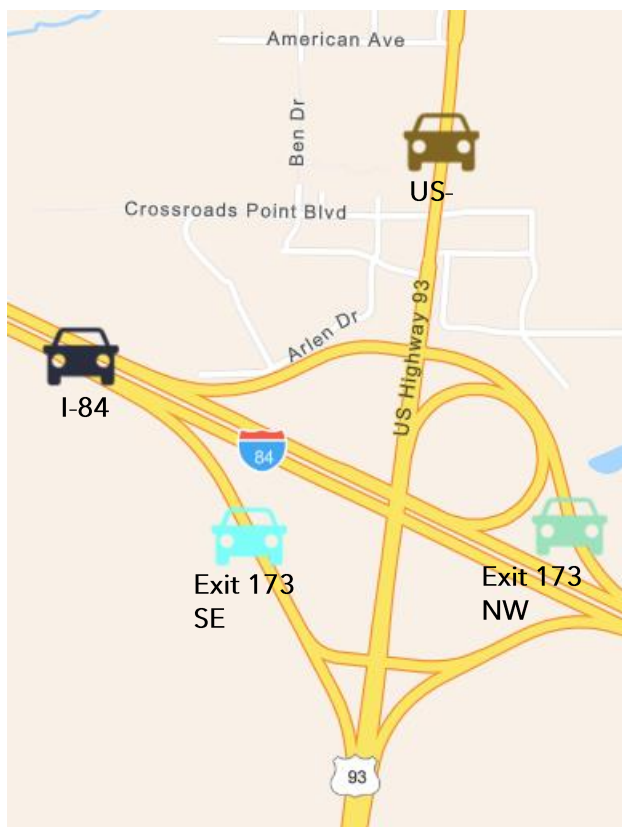
Site Traffic Patterns

The facility's proposed location would lie close to one of the busiest interchanges in the entire state—the intersection between US Highway 93 and Interstate 84.¹⁴ Figure 19 highlights the roads that pass directly by the location of the facility, as well as those that could

¹⁴<http://www.crossroadspoint.com/location.htm#:~:text=Crossroads%20Point%20Business%20Center%20AE,interchanges%20in%20the%20entire%20state.>

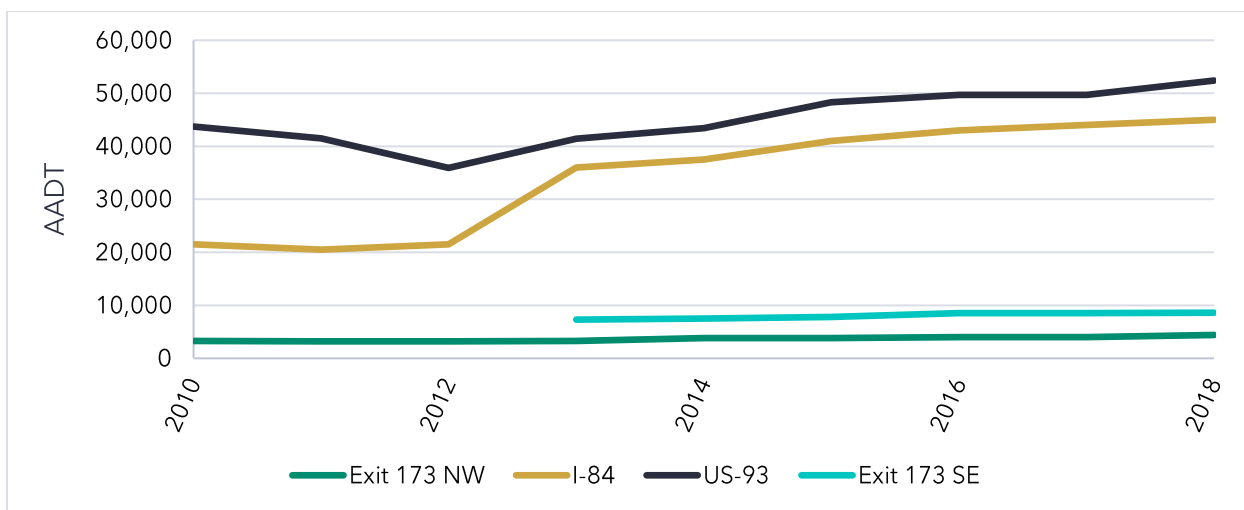
potentially feed traffic to the area, while Figure 20 shows the patterns for average annual daily traffic (AADT) for the four roads displayed in the preceding figure from 2010 to 2018.

Figure 19: Roads Close to Facility Location



Source: ESRI Business Analyst, 2022

Figure 20: Average Annual Daily Traffic for Key Roads Close to Facility, 2010-2018



Source: Idaho Transportation Department, IPLAN 2022

As the figure above demonstrates, traffic on US Highway 93 and Interstate 84 has been steadily increasing across the years. I-84 recorded an average annual daily traffic of 45,000 in 2018, while US-93 saw 52,400 for its AADT in the same year. The two exits that could lead drivers in the direction of the facility have also seen a slight increase in use for this period.

Commercial developers building facilities dependent on visitor traffic (e.g.: retail, entertainment, etc.) carefully examine AADT's before developing. As a general rule of thumb, sites with fewer than 5,000 AADT's are generally not considered good candidates. By this standard, the entire intersection is in a very strong position in terms of auto traffic and visibility. Being this close to one of the main roads for regional travel could bring in a substantial number of visitors traversing the highway. Also, Jerome Farmers Market is located a bit further along US-93, so visitors headed in that direction would pass by the facility, which could add to the visitor count.

Site Recommendations

All things considered; PC recommends the Collocated Option for the CAFE DC. As the saying goes, success in real estate is based on three factors: "location, location, location." Prior to plans of the Southern Idaho Legacy Center's development, the U of I could have utilized the Independent Site and been relatively successful. The Legacy Center development introduces a variable that the U of I can either choose to cooperate with or compete with, and if it chooses to compete it is unlikely to be successful.

An ideal public-private partnership (P3) allows both public and private sector partners to focus on their core purposes and values. PC's perception is that Mr. Ryerson's primary interests include featuring the Magic Valley's food and beverage industry, illuminating the region's history, and making a profit. The U of I's mission is summarized as follows: shaping the future through "innovative thinking, community engagement and transformative education."¹⁵ The marketing and profit motive noted above will allow Mr. Ryerson to allocate resources toward driving visitors and spending toward the Legacy Center development. If operating independently, the U of I would not behave in the same fashion and therefore would not attract as many visitors or as much spending. Collaborating with the Southern Idaho Legacy Center, however, will allow U of I to benefit from the positive spillover effects of visitation and spending, without having to compromise its vision or spend its own resources in doing so.

Compromises and Risk Factors

There are several factors on which the U of I would necessarily compromise if it proceeds with the Collocated Site. The Collocated Site, has less developable space which results in a reduction of size of all building elements, and the loss of the Children's Play Area. Less parking is also available, though that may be compensated by some parking to be shared with other tenants at the Legacy Center development. Though a tighter footprint for development at the Collocated Option, there is still adequate amounts of undeveloped land within Crossroads Point for the U of I to acquire more land for classrooms, dormitories, or other purposes.

¹⁵ University of Idaho, "Mission, Vision, Values." <https://www.uidaho.edu/about/mission-vision-values>.

Several risk factors must also be mentioned. As a University, the U of I will necessarily be subject to decision making processes that include its own leadership and the State Board of Education. Other private-sector partners at the Legacy Center will tend to have flatter organizational structures and will be able to make decisions more quickly. Though an advantage in one sense, it is also possible that the differences in structure could result in differences of opinion on any number of factors. Some of these will arise during the building process such as traffic flow management, wage requirements/standards for laborers, building safety, environmental remediation, to name a few. Areas of potential disagreement in the long term could include branding, marketing, historical representation, labor standards (for shared services), to name a few. All these factors could theoretically be dealt with through a strong working relationship and a Memorandum of Understanding (MOU) that is comprehensive. Nonetheless, it bears mentioning due to the critical importance of execution on this front.

IV. Tourism Potential

Jerome County offers a variety of unique opportunities for recreation, especially outdoor activities such as hiking, OHV trails, horseback riding, and target shooting. There are many additional outdoor tourism amenities under development including Snake River Canyons Park, Devil's Corral, and Shoshone Falls Overlook. The following amenities are also within this cluster of outdoor recreation: hot springs, river rafting, fishing, hiking, Craters of the Moon, and City of Rocks. Even more distant assets such as the Bruneau Sand Dunes are generally considered part of the Magic Valley's amenities.

All of these assets attract a certain number of visitors each year, however the nearby roadways are also used by those looking to get to other tourism destinations within the state, such as Sun Valley in Blaine County, or the Sawtooth Mountains. Traffic coming from Boise headed in direction to Sun Valley—and other destinations outside of the Magic Valley are a prime opportunity for pulling in more incidental traffic and spending to the CAFE DC. Not only is Sun Valley seeing an uptick in visitors but it has also been growing in population including both full-time residents and part-time second home owners.¹⁶ The frequent back and forth travel of these part-time residents to locations such as Boise, Salt Lake, and Twin Falls, will draw them repeatedly past the CAFE DC.

Regional Tourism Industry

Tables 14 and 15 below show the travel-generated employment and earnings for Blaine, Twin Falls, and Jerome County. Blaine County stands out for being the county with the highest percentage of travel-generated jobs and travel-generated earnings. In fact, the top job sector for Blaine County is Leisure and Hospitality.¹⁷

Table 14: Travel-Generated Employment in Three Idaho Counties

Employment			
County	Total Jobs	Travel Jobs	% Due to Travel
Blaine	21,760	5,300	24.4%
Twin Falls	51,860	2,030	3.9%
Jerome	12,400	250	2.0%

Source: Dean Runyan Associates, Idaho Travel Impacts 2010-2017

Table 15: Travel-Generated Earnings in Three Idaho Counties

Earnings			
County	Total	Travel (\$M)	% Travel
Blaine	\$931	\$142	15.3%
Twin Falls	\$2,243	\$39	1.8%
Jerome	\$420	\$3	0.7%

Source: Dean Runyan Associates, Idaho Travel Impacts 2010-2017

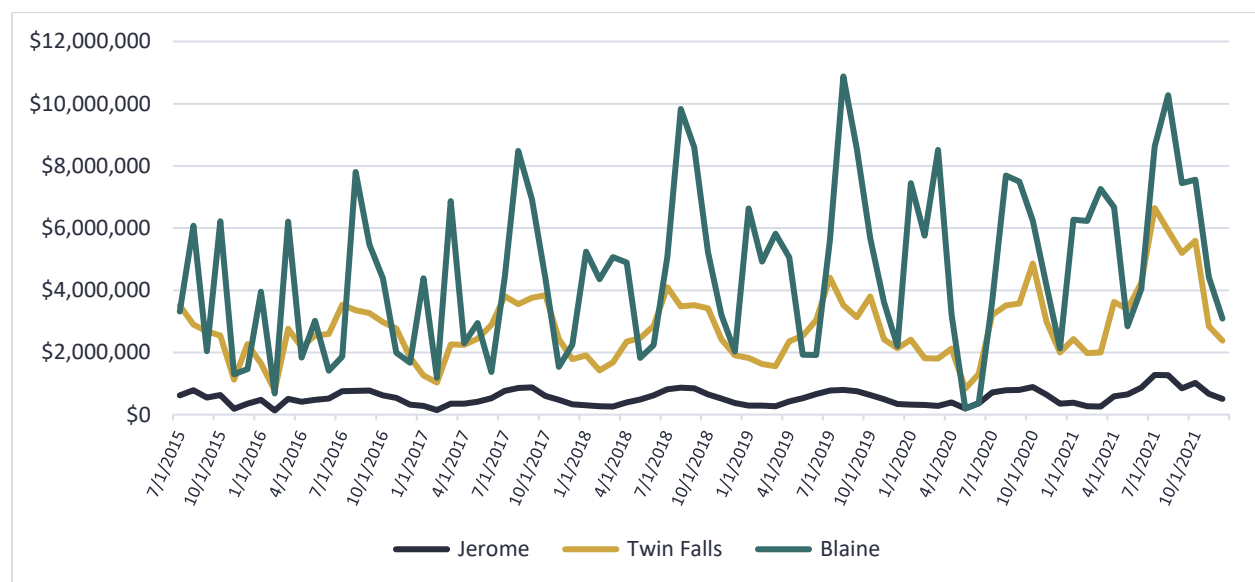
¹⁶ https://www.visitsunvalley.com/wp-content/uploads/2020/06/VSV_ANNUAL_1819_8.5x11_RD10.pdf

¹⁷ <https://www.co.blaine.id.us/DocumentCenter/View/12689/Economic-Development-draft-BCC-9-1-20>.

Lodging sales is another key indicator of progress related to tourism. Figure 21 displays these data month-to-month between July 2015 and November 2021. Blaine County is highly seasonal but does experience both a summer and winter surge. Visitation to Twin Falls County tends to peak in summer months but also tends to sustain into the early Fall (i.e.: July through September). Currently, Jerome County is not as large, and does not see the same degree of seasonal swings.

Several positives for the CAFE DC can be drawn from these data. The varying seasonal surges to Blaine and Twin Falls result in three seasons of high visitor traffic: summer, winter and fall. Although Blaine County appeared to underperform in 2020/21 due to effects of the pandemic, the Magic Valley saw the opposite effect. 2021 was the strongest year on record for both Twin Falls and Jerome Counties, hitting their peaks in revenue in July 2021. Though COVID restrictions have largely abated in the United States, the shift could signal a change in behavior for many visitors. Anecdotally, those in the tourism industry in the region indicate that visitors from California, Oregon, and Nevada significantly increased over the past several years.

Figure 21: Idaho Lodging Sales by County, July 2015-December 2021



Source: Idaho Department of Commerce: Idaho Travel Council

Lastly, PC also received Google Analytics data for the visitsouthidaho.com website. The statistics indicate increased visitation in virtually every day of the year between 2017 and 2021. The location of visitors seems to have broadened as well. In 2017 the most frequent location of web visitors were nearby communities such as Boise, Meridian, and Salt Lake City. Top locations in 2021 also include locations such as Seattle and Los Angeles.¹⁸ The Seattle effect is particularly interesting as this location saw an over 300% increase in visitors between 2020 and 2021.

¹⁸ Google Analytics for visitsouthidaho.com (Jan 1,2021-Dec 31,2021)

CAFE DC's Potential Economic Impact

PC developed an economic impact scenario based on the pro-forma presented in Chapter [VIII. Financial Plan](#), and our conclusions on the increased level of regional visitation due to the CAFE DC. The CAFE DC would create or support 18 additional jobs in Jerome County, add \$728.6K in labor income, and expand the economic base by \$810.3K (i.e. Value-Added). As indicated by the multiplier effects on each metric, the CAFE DC would expand economic activity outside of it's own organization, for example, economic output would increase by an additional 55 cents for every dollar of output by the CAFE DC.

Table 16: Economic Impact Summary for Jerome County

Impact Type	Employment	Output (\$M)	Labor Income(\$M)	Value Added (\$M)
Direct	16	\$406,700	\$661,200	\$701,300
Total	18	\$628,900	\$728,600	\$810,300
Multiplier	1.11	1.55	1.10	1.16

Source: Points Consulting 2022 using IMPLAN

Given that the CAFE DC will partner with numerous other local establishments, it will produce an impact for other local businesses. The top ten most impacted industries in terms of increased employee compensation, are presented in Figure 22. Outside of the CAFE DC itself, the most impacted industries would include Hotels, Restaurants, Retail, and Hospitals.

Figure 22: Economic Impact on Employee Compensation



Source: Points Consulting 2022 using IMPLAN

Economic Impact Methodology & Terminology

To generate this EIA, PC used the IMPLAN input-output (I-O) model. IMPLAN is a subscription-based tool that utilizes data from a wide variety of public-sector sources to measure economic activities for all 3,006 counties in the United States. IMPLAN uses annual, regional data to estimate businesses' and households' buying/selling relationships in order to predict how specific economic changes will impact a regional economy. Once entered, the IMPLAN model calculates how those changes would ripple across all sectors of the regional

economy. The IMPLAN model includes numerous built-in metrics for industries, such as employment, output, local spending coefficients, industry-specific spending patterns, payroll, exports and imports, profit margins, and so on.

PC used the standard three channels of impact that are included in any EIA. Added together these channels result in the total economic impact to a region. These channels are identified as follows:

- **Direct effect** - effects directly upon a given industry/industries selected by the IMPLAN user, which in this case, is the CAFÉ DC.
- **Total effect**- effects both directly on the industry in question, the supply-chain impacts, and additional ripple effects of household spending due to increased income.

For each given channel, IMPLAN provides many metrics that explain the extent of impacts. PC limited our reporting to the following metrics: employment, labor income, value-added, and output. The following definitions provide greater details related to these metrics:

- **Employment (or Jobs)** - jobs created by the annexation to Idaho. IMPLAN's employment estimates are in terms of full-time equivalent positions.
- **Output** - also sometimes referred to as "sales," output refers to the economic value of a good or service rendered in the marketplace.
- **Labor Income** - represents wages, salary, and benefits collected by employees, contractors, and other paid workers to support the given project. This category excludes income accrued to owners and investors.
- **Value Added** -the total of all industries' value-added is equivalent to the region's Gross Regional Product (or GRP). GRP is a more conservative, and accurate, measure of impact than Output because it only quantifies the value-added by companies to the inputs that they received. Technically speaking, GSP includes employee compensation, proprietor income, taxes on production and imports and other property income, and excludes the value of intermediate inputs.
- **Multiplier Effects**- measure total change compared to direct change for any given metric, for example, a multiplier of 1.36 for labor income indicates that 36% more earnings are produced at the indirect and induced levels, than the direct effect alone.

V. Operational & Management Plan

Facility Usage

PC's expectation is that the CAFE DC will attract significant attention and generate significant direct revenues. Whether it locates at the Collocated Option or the Independent Option, UI should seek to compliment and not compete with businesses in the South Idaho Legacy Center. Where UI can fit into this equation is providing a quality Interpretive Center. This is not to say that the CAFE DC needs to make no revenue. It can and should generate revenue via the following means:

- Conference room and facility rentals
- Sponsorships with local businesses
- Admissions fees and/or donations
- Retail food sales (CAFE/Deli/Ice Cream Parlor)
- Gift shop sales
- Animal pavilion rental
- Guided tours of the research dairy and Food Innovation Hub

Visitors to the Magic Valley include a mixture of retirees, outdoor enthusiasts, and families with children. Of these cohorts, families with children are the most likely to make the CAFE DC a destination but other groups will be occasional and incidental visitors as well.

The Interpretive Center industry has various approaches and philosophies on admission fee structure. Some facilities opt for a "suggested donation," while others require a fee for entry. PC's recommendation is to not charge an entrance fee, but rather focus on point-of-sale experiences and products which visitors are likely to spend money on. Some money will come from visitors, but by not charging an entrance fee the CAFE DC will be better positioned to approach donors and corporate sponsors.

Given that finances for CAFE DC will be tight, it is important that U of I have clear guidelines on which usage types will be complimentary and which will be for a fee. This will particularly be the case for conference room space, which appears to be in very short in supply in the Magic Valley. Following the U of I's policies for the Moscow campus, only University clubs are given complimentary access. Following this policy, access may be granted to 4H and FFA activities, which are a component of U of I's agriculture extension offices. Uses for business, government and other educational purposes should be required to pay.

Interpretive Center & Activities

A professional exhibit designer is highly recommended to be hired for the indoor construction. A professional in this industry could help CAFE DC design a fresh, interesting and interactive experience that is designed for the target demographic groups. Such a designer could also provide the appropriate balance of space utilization, foot traffic flow, and capacity utilization.

All the exhibits should have a connection or stem from an initial exhibit with water and the land. From all businesses, commercial, and community operations starts with the need and use of natural resources. The story of environmental protection and stewardship needs to be

central. Those in the dairy, beef and crop industries that PC met with were quite passionate about telling the story of how carefully agricultural providers are working in balance with the environment. They also feel the CAFE DC could be their opportunity to “right the record” on this front as there is little understanding in the general public of how much effort is applied on these fronts.

The exhibit spaces should be focused both on learning and tactile hands-on activities. Any opportunity for youth and adults to participate in activities while learning should be utilized. A few possible examples generated during focus group brainstorming are included below. This is just a sampling and surely many more concepts could be included:

Potential Indoor Exhibits/Activities

- Use of a water table with diverters to simulate a real-life canal and ditch infrastructure
- Certain aspects of cheese making (e.g. draining curds, and molding cheese)
- Milking a cow
- Classification of various cuts of beef
- Diagraming and explanation of cow’s stomach
- Fabrication (sorting of various beef cattle parts)
- Innerworkings of a biodigester

Potential Outdoor activities (Occasional):

- Sheep shearing
- Calf birthing
- Farming equipment training/showcasing
- Herbicide and pesticide trainings

Gift Shop & CAFE

The Gift Shop will operate under the same hours and days as the Center which is explained in detail in the Hours of Operation section. Primarily this area will focus on retail of agriculture and education products such as but not limited to: clothing, books, games, collectibles, and smaller replica models. Given the number of alumni and students in the UI extension programs, having a small section of Vandal merchandise would be beneficial to promote the presence and involvement of the University in the area. Local major and small businesses associated with agriculture can partake in selling small quantities of their products.

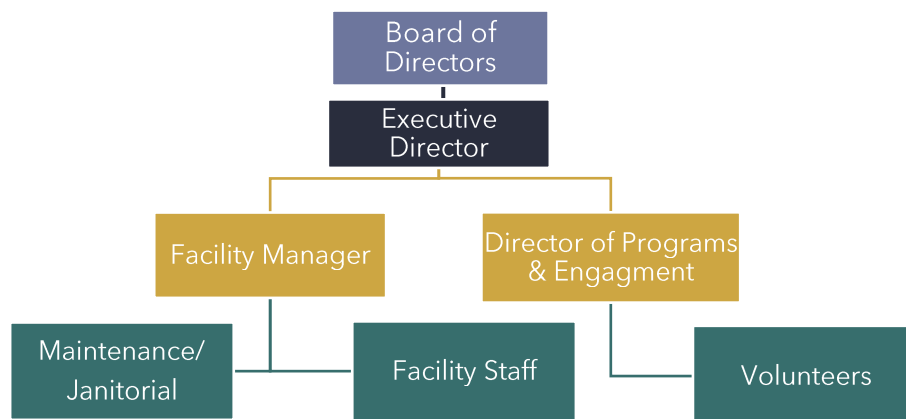
Most local businesses that PC met with were intersted in this concept but would not want to staff their own gift shop. This provides a perfect complement to the Food Hall concept to be developed at the South Idaho Legacy Center, which will require all participating businesses to outfit and staff their own booths for selling food, beverages, and materials.

The CAFE could focus on any number of locally produced products. Initially, the CAFE should sell products grown or manufactured in the Magic Valley. Over time, the balance could shift to products developed by the Food Innovation Center. Some highly popular items that the U of I should consider would include the following: ice cream, gelato, boutique cheeses, liquor/beer (not to be consumed on-site).

Staffing & Operations Plan

For the facility to properly operate on a day-to-day basis, adequate and plentiful of staffing need to be obtained prior to the launch day. The final square footage of the building will ultimately determine the available space for exhibits, gift shops, animal pavilion etc. The following is a fairly “lean” plan for operations, which assumes many outsourced functions (e.g.: IT, accounting, etc.) The staffing plan also assumes a high level of college student participation (under Facility Staff) and occasional use of volunteers, primarily for special events. The costs of wages for the listed staffing are provided in detail in Table 18 of the [Financial Plan](#).

Figure 23: Staffing Organization Chart



The CAFE will be overseen by a full-time appointed Executive Director. The Board of Directors will be responsible for filling the position, whether they are from the UI Extension offices, the Moscow campus, or a local resident of Jerome. The Board or the appointed Executive Director will take the task of filling the next positions of the full-time Facility Manager and Program Director. Each of these managerial roles will oversee monitoring, hiring, and assisting facility staff members. The Program Director will also be able to take on the role of Public Relations (PR) for the Center. It is essential to connect the mission of the Center to the public and related agriculture industries. This role will also be the focal point of advertising the Center to visitors, opportunities in education at the U of I, postings of positions at the related agribusiness within the exhibit, and communicate to stakeholders and community of updates, events, and news.

The day-to-day facility staff will have five to six part-time workers on the floor, and during the after-hours of operation two to three janitorial staff will be on site for cleaning. Amongst the five to six hired members, one will run the floor of the gift shop, but during holiday and peak tourist season PC recommends having two employees staffed. All staff that will be handling, preparing, or serving food at the facility will be required to have the proper training and certification in food handling. Maintenance staff should either be trained or hired on with experience with the technology and utilities used for the exhibits to troubleshoot any issue when needed. Additionally, the facility will need a grounds person onsite from time to time on a graveyard shift to take care of animals that are lodged overnight.

Student staff, which makeup parts of the facility staff, can be absorbed from local high schools or Colleges/Universities interested in the agriculture industry. If the University of Idaho were to pursue a partnership with ISU or BYU, they can facilitate promotion and opportunities to visit and work at the Center. The option to pay these students via work study, rather than out of pocket, should be further explored.

Volunteers to be staffed at the Center can be a mix of local participants and employees from partnering businesses/stakeholders during the feasibility study process. The stakeholder's staff can take time out of their work schedules to volunteer as tour guides of the three CAFE facilities and specific exhibits, provide in-depth explanation of certain processes, answer questions, and share insider information. This will be especially important during events coordinated with local schools for field trips, private events, or during peak times of tourist season.

Local and residential volunteers can also contribute to supply animals and/or farming equipment for classes, demonstrations, or events at the Center. Individuals that coordinate with the local schools to showcase animals or equipment can be directed to the Director of Programs to rent or use open space for the day. If the volunteers are interested in serving as docents, the CAFE DC should provide some form of non-monetary compensation, such as free meals, gift cards, merchandise or other similar concepts.

Hours of Operation

It is recommended the facility operate Monday through Friday 8am to 6pm and weekends 9am to 8pm. The extended weekend hours are to accommodate for work and family obligations during weekdays. Hours are subject to change for holiday and seasonal hours and increase or decrease based on the level of tourism to the area. Since the Center will offer private event and space reservations, after hours work will be required to allow guests access and have staff available for cleanup and operations. At most, the extended time after operational hours will not exceed 10pm. This will give the part-time staff enough time for cleanup and not require working overtime.

For the CAFE DC staff to securely gain entry to the facility before and after operating hours, PC recommends installing an RFID chip door system, much like ones the University of Idaho uses on their campus. These will be located in storage rooms, janitorial closets, kitchen, delivery/drop off, exhibit rooms, gift shop, offices, breakrooms, and other access points into the building.

Board Organization

The project team recommends the UI identify no more than 12 and no less than five individuals for the Board of Directors. The board is suggested to be made up of current stakeholders of the CAFE DC process, U of I agriculture directors or program leaders, and partners who will aid in project funds. Once the members have been established, prior to or during construction of the Center they will convene to establish the policies and procedures of daily operations for the facility and its staff. The U of I should also consider awarding a board seat to a remote member who is or has currently served in leadership at one of the Peer Facilities mentioned in the following section of this report.

The Board of Directors will directly oversee the CAFE DC Executive Director and have responsibility to hire/fire and alter wages. The board will also be responsible for writing a job description for the Executive Director. Though no expectation of donorship/sponsorship should be required, it should be expected of participating for-profit institutions.

The board should meet in-person or in a hybrid (in-person/remote) environment between bi-annually and once per quarter. KPIs results and revenue cost information should be shared with the board either monthly or quarterly.

Key Performance Indicators (KPIs)

KPIs are typically used by boards and organization leadership to monitor progress toward goals. In particular, they are helpful for determining in the short-term if an organization is on-track toward its long-term goals. The CAFE DC will have elements of several business models including retail, tourism, non-profit, commercial rental, and museum/historical sites. For that reason, it's KPI's should reflect this eclectic mix of purposes. Ultimately, KPIs and tracking methods will need to be determined by CAFE DC's leadership and board but the following are some initial suggestions:

- Financial Success: sales, donations from visitors, sponsorship and donations from private sector sponsors, revenue from conference room and animal pen rentals, maintaining personnel and operating costs within acceptable margins
- Educational Impact: number of visitors per month/year, ex-poste visitor surveys, annual meetings/visitors from FFA and 4H groups,
- Local Impact: number or percentage of repeat visitors, increase in local AADTs (i.e.: traffic), increase in foot-traffic (using source such as SafeGraph)

Marketing & Community Relations

The Executive Director will bear primary responsibility for serving as the "face" of the CAFE DC to local communities. The appropriate candidate for this job should have credibility and experience in the ag community. There are various means for remaining connected to the local ag community, a few of which are noted below. In each case, the CAFE DC Executive Director could serve in a volunteer capacity for increased visibility. Spending the advertising budget toward these purposes should also be considered:

- Local high school sporting events
- Local rodeos, particularly the Magic Valley Stampede
- County fairs for each of the surrounding seven counties within the Magic Valley (particularly Livestock Shows)
- Chamber of Commerce events (primarily within cities of Jerome and Twin Falls)

The CAFE DC should also consider hosting its own annual event, for purposes of fundraising. Such an event could include typical features such as live/silent auction, raffles, guest speakers, etc. The CAFE DC should also consider more creative methods as well such as hosting live performances, guest lecturer series', and ag themed special events such as tractor racing, equestrian performances, hay rides, and an annual fall/harvest festival.

VI. Peer Facilities Overview

Sage Center

Built in Boardman, Oregon in 2013 the SAGE (Sustainable Agriculture and Energy) Center is described as an interactive museum with primary focus on the areas farming, agriculture, and sustainable energy. The site was constructed by the Port of Morrow with intent to educate all visitors to the site on technology, processes, and history of the agriculture in the Magic Valley. The center promotes education through hands on learning, such as milking a life size plastic cow, sit inside a tractor model to simulate how the machine operates and planting corn crops in a simulation field, use control levers to maneuver a bucket truck, rotate a water recycling wheel to showcase the flow and process of use and reuse of water, and many more activities.

Other exhibits that do not have hands on interaction do display multiple life-like and/or life size features pertaining towards the topic. The potato processing area highlights each key segment of the processes and displays hundreds of potato sculptures as they travel through the conveyer belt. Outside the center also displays larger farm equipment to interact with, a large wooden playground for children to play on, and large fields to walk and play with pets.



The SAGE Center, Chery Landes, *Tabby Cat's Pawprints*

At the end of the Center, the SAGE Center sell freshly made Tillamook ice-cream year-round. A large gift shop is also next door that sells a variety of goods. Locally made meat, candles and wax melts, sugar cookies, clothing, mugs and glasses, ground coffees, indoor and outdoor décor, toys and more items. Products from the center can also be bought online and shipped to your home if unable to make a purchase during the visit or as an extra souvenir.

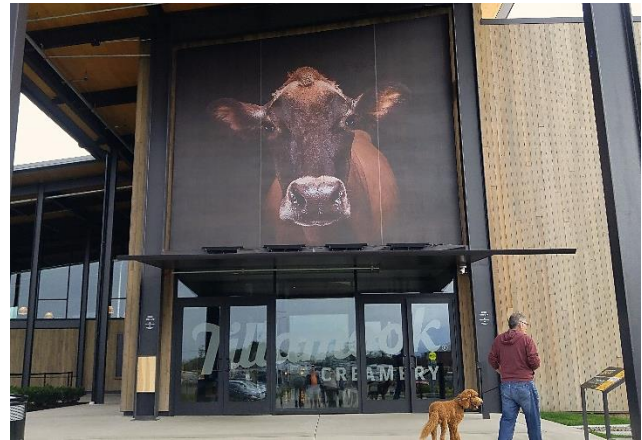
Admissions are charged upon entry with the highest cost being no more than \$20 for a Family and as low as \$3 for Students and Seniors. Parking is structured as a tier, larger parking for RV' and Buses are in the farthest back, then general parking, and accessible parking sits in front of the facility. Space rentals are also available for groups, meetings, presentations, etc. They have a community room, both large and small conferences rooms, theater and one can even rent the entire SAGE facility. Customizing amenities during the rental are also available such as private movie viewing, access to after-hours reception and adding an ice-cream social. A rental agreement is provided prior to the event that requires all pertinent details of the event and prices for each area.

Tillamook Creamery

Before setting foot inside the creamery, guests are greeted by a large, pictured display of a cow, Flower, known as the company's very own award-winning show cow. The 38,500 square-foot facility starts at the ground level and a wall display of the history of the area and a portion of the Tillamook bus that travels all over the country to give away cheese which visitors can take a picture in. Up the stairs to the second level of interactive areas such as a life-like plastic cow to demonstrate hands on milking, a life-size calf to simulate how they are fed, interactive cow facts that briefly review the type and history of all local cows, technology such as a cow brush to scratch and massage the animals and a collar that tracks individual cows' health and activity.

Around the corner guests can view real time cheese production and are guided by written displays of function, importance, and breakdown of the product moving from start to finish. It then leads to free samples and more displays and facts of milk, cheese and procedures. The guests are then guided back downstairs to a larger market space selling local dairy goods: ice-cream, cheese sauce, shredded cheese, etc., which merges with the gift shop to purchase wine, clothing, snack, accessories, etc. As visitors work up an appetite there are food courts with freshly made items and more variety of goodies. If guests do not have the time to sit down and eat, take out menus are also offered and menus are provided on their website.

While there are not any outdoor activities or exhibits, the Creamery on average has more than 10,000 visitors Monday through Sunday free of charge. Their website also promotes more interaction such as a virtual tour video, pages of recipes to download which are organized by meal type and specific base product, and limited items and food are available to purchase online.



Moo, Andy Melton, Flickr

Fair Oaks Farms

The rural facility in Fair Oaks, Indiana is held as the number one agritourism destination of the Midwest which incorporates education, local cuisine, and relaxation all in one center point. More than 500,000 visitors annually come to Fair Oaks. Entering the Fair Oaks Farm, guests are first inclined to purchase a general admission for entrance. The price for individuals is \$60 and families \$100. With a

large map displayed on their back wall it lists the location and types of activities available. Each of the buildings are within walking distance from admissions and each other. The location not only provides general restrooms, but restrooms for those in needing special assistance and a mother's

area for feeding and changing. This location is adjacent to the local Fairfield Inn which is constructed to represent a barn and compliments and promotes the Fair Oaks Farm.



Fair Oaks Farm, Casey Smith, *IndyStar*

The Dairy Adventure is a large space for children to have hands on simulation of milking, processes of cow's digestion and waste into energy, a game space setup as a quiz to educate children on harvesting, and more visual learning in dairy production. Attached to the space is the Birthing Barn where children and families sit in front of a plexiglass protected stage and have clear view of cows when in the final stage of labor. The Pig Adventure is a large indoor climbing center of ropes and ladders with a small upstairs with a kitchen and grill dining space. Crop Adventure is not as interactive, but has visual displays of places, products and materials that use crops. On the same level, the next room is made into an underground-like space as if the visitors are beneath trees and crops in the soil. With life-size roots and visual displays, each area dives into the process of water use, soil interaction and reuse. This space also has a small conference room where classes and workshops are held that are open to the public.

The Feedbarn Lunchroom is a large dining hall with a small section for food vendors. The Farmhouse Restaurant hosts main dining in which guests can see their food being prepped and cooked, a large board room, its own ballroom, and two separate conference/presentation rooms. Outside of the dining area, a large fire pit is accessible for guest to lounge by. The COWfe is both a food court, gift shop, and view of the processing plant. Local meats, cheeses, dairy, popcorn, etc. are sold here. The Dairycateseen is another shop to buy even more locally made goods and sells generic brands and products one would see in a local gas station or market. Next door is a large and gated dog park with some obstacles for pets to run through and jump around.

School and Tour groups can reserve and plan their trips with the site and can be offered low costs in admissions and packages that cover costs of food and access to each adventure building. For each restaurant and dining hall, menus are provided on their website and all

food provided is Farm to Table. Aside from group packages they also offer wedding services, corporate meetings, agriculture meetings, and other gatherings. Guests can reserve birthday parties, and private social events, all with customizable menus via their catering service and other amenities. Additionally, events such as Holiday Markets and Forest of Lights are put on to not only bring in more tourists, but for locals to also enjoy and take part of the events.

Farm Wisconsin Discovery Center

Located in Manitowoc, Wisconsin, opened in 2018 as a non-profit, and cost \$13 million to develop. A Manitowoc County retired dairy farmer, Norval Dvorak, was inspired by the relationship of agriculture, education, and community after visiting the Fair Oaks Farm in Indiana. Dvorak, his family, and supporters were able to acquire a \$5 million non-state agency grant from the support of Gov. Scott Walker. The remaining costs were acquired through corporate and individual donors. The Center does not operate in conjunction with any land-grant universities. It is reported as an organization which normally receives a sizeable support from both governmental entities and the general public.¹⁹

The 10,000 sq/ft Farm Wisconsin Discovery Center brings agriculture, education, and interaction into one place. Incorporating hands on and visual learning, guests can understand how to plow fields, hand plant crops, simulate milking a cow, show step by step process of water cycles, crop life cycle, and ways in which agriculture unites local industries and markets. Exhibits in the Center include the life cycle of a seed into the supermarket, dairy production and processes, the story of food from field to families, how farming benefits and manages the local ecosystem, interaction with farming and modern technology, and connections between agriculture, industries, communities, and education. Visitors can visit the Land O'Lake Birthing Barn next door in the auditorium to view a live birth. Guests can also interact with the calf post-labor. The Birthing Barn has had over 500 calves born at the site.

Not only can guests see and feel the interactions at the discovery center but can also get a taste for what Farm Wisconsin is all about. The cafe located within the center sells freshly made breakfast, lunch, and dessert options promoting the farm-to-table experience. The Farmhouse store is their own gift shop and retailer of locally made cheese and wine from the state. Sponsored by Cedar Crest Ice Cream they developed a separate ice cream parlor for visitors to sit back and enjoy over 80 ice-cream flavors. In May of 2018 Cedar Crest contributed \$250,000 to the



Farm Wisconsin, Split Rock Studios, *ksjdesignstudio*

¹⁹United States. Department of Treasury. Internal Revenue Services. (2016). *Return of Organization Exempt from Income Tax (Form 990)*. <https://farmwisconsin.org/wp-content/uploads/2018/09/990-2016.pdf>

Discovery Center as a gift. The gift financially supports the Center and assists local farmers who have helped the center work from the ground up.

The site also allows space rentals for numerous events such as weddings, corporate meetings, non-profit conferences, and private events. The Center permits the renter to choose the layout of the room, customizable menus, and costs of goods and services per room per hourly use. One can even purchase admissions for the events guests to tour the Discovery Center.

VII. Stakeholder Engagement & Project Background

Key Themes

Over the course of the project, the project team conducted interviews with roughly 20 regional leaders in fields of economic development, community development, higher education, business owners, and social services. The following are key findings from these discussions.

Regional Strengths

Manufacturing/Food Processing

The Magic Valley is the nationally known hub for food processing and food-based manufacturing of the PNW. The area has had great success in attracting companies to establish roots in the area such as Chobani, Darigold, Commercial Creamery, Scoular, and coming to the area by 2023, TrueWest beef. These companies bring or have established hundreds of employees and families to the area. As these companies continue their success, the trend continues to bring more private developers to the area.

Community

Jerome County exhibits great community tendency for their support of local businesses, schools, and residents during times of need. Residents and families are strongly connected to agriculture amenities such as FFA and 4H. The community relishes in the success of the agricultural industry and the preservation of natural amenities. They want to continue to grow and develop while maintaining what is naturally available in the region.

Education

The desire to expand their schools and programs from K-12 and into higher education to properly prepare younger generations into the workforce and establish incentives for the generations to stay in the community. Local companies, farmers, and Universities are willing to collaborate in order to best aid future students and continue success of generations to come. Current leaders in education are wanting to push for more resources, space, and opportunities to teach younger individuals but also families of importance in agriculture and connections in everything they use and do day-to-day.

Agricultural education staff at Jerome High School indicated that their facilities are greatly lacking in capacity for the number of students who are participating in 4H, FFA, soil and crop sciences and other forms of agricultural education. Additionally, getting live animals on campus is challenging enough that teachers typically do not even attempt it. PC did not communicate directly with agriculture teachers in other districts but given that these

programs are typically not highly prioritized it can be assumed that similar issues exist with other schools as well. These needs open the opportunity for many types of activities which could occur at the CAFE DC that were previously infeasible on high school campuses.

Challenges

Workforce

Despite the abundance of available jobs within the Magic Valley, there is an observed lack of those willing and able to work. One possibility in the lack of jobs being filled is the communication of the available jobs and description of the work. The second is jobs that require certification or prior experience for the position. Manufacturing and processing companies can work with local Universities to educate students on available opportunities while simultaneously providing the space to display the fine details of local company operations.

Since the pandemic companies that were able to continue operation have seen an issue in employee burnout on overworked hours. To retain current employees, they would need compensation in pay or time off, but with the lack of willing workers this poses as the first major obstacle to manage.

Meeting Space

One interesting element which arose from conversations with business leaders is the fact that the Magic Valley is desperately lacking in large and medium sized conference room space. In lieu of better options CSI and local hotels are commonly utilized. However, hotel conference centers are typically not large enough. CSI's facilities have the disadvantage of being on-campus which makes parking and way-finding difficult for visitors, and usage sometimes competes with CSI activities.

University of Idaho Competition & Brand Awareness

The University of Idaho is known throughout the Gem State as the state's Land Grant University, and as a great option for receiving agriculture and STEM related education. That said, South Central Idaho has strong economic and cultural ties with other regional institutions, the most preeminent being Utah State University (USU). USU is aware of the richness of the South Central Idaho talent pool, and is actively recruiting students using in-state tuition options according to certain criteria. In addition, some U of I alumni within the region report that the Vandal alumni network, though strong in numbers, is fairly tepid in terms of involvement and community. The CAFE DC represents an opportunity to turn around these perceptions and potentially reclaim some of the young talent who would otherwise attend other institutions.

Regional Literature Review

America's Most Diversified Food Basket

Southern Idaho leads the state in the agribusiness sector. The region received the *Federal Manufacturing Community Designation* for the food category in 2015. To employ and grow the regions food processing industry the College of Southern Idaho (CSI) Food Processing Technology Program trains and certifies students to advance in the manufacturing careers. The program, designed by local food manufacturing industries, mimics, and focuses on what people will be utilizing and working with in their careers. The college also has a Workforce Development program to collaborate with businesses and professional industries to develop training programs for specific talent needs and growth in the region. Aside from training in food processing, the program also provides training in industrial safety, welding, maintenance, manufacturing, and healthcare.

Contribution of Agribusiness to the Magic Valley Economy, 2018

The Magic Valley in Idaho is the regional hub for goods and services in a 100-mile radius. This region has grown considerably from farmsteads to a large agribusiness industry that provides significant economic stimulus for its residents, as well as goods for both national and international markets. The money generated by agricultural exports flows through the local economy, which in turn generates indirect economic activity for the other businesses in the Magic Valley. The agribusiness industry contributes about 59% of total sales, which constitutes 48% of the gross regional product (GRP). Agribusiness is also responsible for the creation of 42,600 jobs, which makes up 42% of jobs in the Valley. The total output of this industry in 2018 was just over \$8.6 billion.

Half of the total production of the agribusiness industry is comprised of agricultural processing or manufacturing. In terms of economic activity, the Magic Valley's biggest driver is the dairy product manufacturing sector, which includes every business that takes raw milk and processes it into products such as cheese yogurt, whey, etc. In fact, The Magic Valley is home to 72% of Idaho's dairy cows, this makes the state rank third in milk production and fourth in the number of dairy cows at a national level. The second and third largest sectors in the Valley are potato manufacturing and beef production respectively. This industry is vertically integrated, meaning that it is engaged in both the production and processing of food, going from farm suppliers, to ranchers, to processors and retailers, and finally ending with consumers in the domestic and international markets.

Economic Contribution of Idaho Agribusiness

Agribusiness contributed \$21 billion in sales, created 75,700 jobs, and generated \$6.1 billion in value added for the state of Idaho. Exports for this industry also stimulated economic activity in other sectors of Idaho's economy, creating a total of 59,800 jobs outside of agribusiness. This industry also accounted for 17% of Idaho's economic output, totaling over 12.5% of the state's gross state product (GSP). Additionally, approximately one in every eight jobs in Idaho were directly tied to agribusiness in the year 2019, which means this sector comprises a greater share of the state economy than all the neighboring states and the U.S. The state of Idaho also ranks as the top producer of potatoes, barley, peppermint oil, and trout in the nation, while also ranking in the top five for international exports of four major commodities—dairy, fresh vegetables, processed vegetables, and wheat.

Participants in Focus Group Discussions

PC first wishes to thank Larry Hall from Jerome 2020 in assisting our team in arranging the focus groups during our brief stay in Jerome. We also wish to thank all the individuals and groups who provided great feedback and visions for the future of the Discovery Center

- Alan Hanston & Shawn Sauer - North Side Canal Company
- Jay Theiler & company - True West Beef
- Steven Hines & Joel Packham - University of Idaho Extension
- John Wright - University of Idaho CAFE Dairy Project
- Rick Ryerson - Charter Equities, Inc.
- Larry Hall - Jerome 20/20 Economic Development
- Melissa Barry - Visit Southern Idaho
- Nathan Murray - Economic & Community Development, Idaho Power
- Andrea Wiesenmeyer - Jerome County Fairgrounds Manager
- J.C. Olsen - Jerome County Fair Board
- Pat Charlton - Jerome School District, Superintendent
- Nicole Lebsack- Jerome High School teacher
- John Crozier & Ben Crouch - Jerome County Commissioners
- Bill Bridges - Commercial Creamery and Snake River Canyons Park
- Jan Rogers - Southern Idaho Economic Development
- Bill Lickley - Co-Chair of the Beef Check Off - International Marketing Committee
- Arlen Crouch - Crossroads Point Business Center

VIII. Financial Plan

In an effort to help the U of I plan for the future of the facility, PC has developed a financial plan (or pro forma). This forecast accounts both for anticipated sources of revenue and expenses.

A few assumptions must be recognized prior to using this data. Firstly, this is a *steady state* model that does not account for the run-up or absorption period. Generally speaking, the first few years of operation of a new facility tend to be characterized by aberrant finances. Expenses are unpredictable because operational efficiencies have yet to be reached. Also, revenues tend to be lower, as customers have not fully integrated the new facility into their life patterns. That said, our team recognizes the importance to knowing up-front and long-term costs, so PC has generated an annualized estimate of costs to the University for the first 20-years of operations, which are presented in Table 17, both in nominal and net-present value (NPV) terms.

Secondly, this pro forma does not separately address the unique costs and revenues dependent on the colocation or independent location options. This is not to say that there would be no differences in economic performance. Changes in the facility location would necessarily affect facility design, which could therefore effect space utilization, amenities, and programming, which would thereby affect expenses and revenues. Determining these differences would require a separate site plan and architectural plan, which has not been completed for the colocation site. In short, this pro forma is a helpful approximation regardless of location. A fine-tuned pro forma should be generated once the U of I has determined the precise location and design of the facility.

Table 17: Expected Costs to University of Idaho in First Twenty-Years

Average Net Revenue (Cost)	Amount
First 5 Years	(\$527,740)
6 to 10 Years	\$6,000
11 to 15 Years	\$44,000
16 to 20 Yearsa	\$50,000
Total Nominal Cost	(\$2,138,790)
NPV	(\$2,131,671)

Source: Points Consulting Financial Model, 2022

As shown in Table 17, PC anticipates the U of I to spend roughly \$2.14M in the first twenty years of operation. In present value terms this equates to \$2,131,671.²⁰ The costs include both hard and soft costs for construction. Several other important categories revenue and expense categories are excluded for the reasons noted below:

- Land costs are excluded because the owned parcel is an existing asset that can either be used or swapped for the Collocated Option.

²⁰ Present value discounts future costs and revenues to account both for inflation and the time-value of money.

- Exhibit costs are excluded because it is assumed that sponsors and donors will fully pay for these features. Businesses participating in the CAFE DC will be the direct beneficiary of increased branding and awareness and are therefore assumed to be the bearers of these costs. However, initial exhibit costs are estimated in Table 20 under the section [Initial Costs](#).
- Furniture, fixtures and equipment (FF&E) are not included in the pro forma. It is common to exclude these considerations at this stage because costs will vary greatly depending on what type of equipment and internal furnishings are selected.
- This estimate also does not include the non point-of-sale revenue from U of I licensed agricultural products. It is assumed that these revenues would be accounted to the College of Agriculture and Life Sciences, rather than the CAFE DC, in particular. If the CAFE project is successful, including both the Research Dairy and the Food Innovation Center, these revenues could be considerable.

Pro forma details are displayed in Table 18. The source of the given figures and any underlying assumptions are explained in the “notes” column. In cases where no notes are provided, the estimate is based on PC’s experience working with other organizations operating on a similar scale.

To summarize the key points, once fully stable:

- The CAFE DC is expected to earn \$1.55 M in annual revenue, the majority of that income is *earned* revenue through sales and rentals. (It also includes routine donations from the University).
- Annual operating expenses are anticipated to be \$849K, of which the lions share are personnel expenses (78%)
- The U of I support of \$282,929 is calculated as the remaining balance to bring the CAFE DC’s net cash flow to zero (i.e.: self-sustaining) status.
- The CAFE DC’s EBITDA of \$702K is adjusted down to account for depreciation and interest expenses, arriving at net profit (loss) of -\$54K.
- Finally, after accounting for the remaining principal balance, the net cash flow of the CAFE DC is \$0/year.

Project Pro Forma

Table 18: University of Idaho CAFE Discovery Center: Stability Pro Forma

INCOME	Stability Year	Notes
Retail Food Sales	\$786,900	comparable to WSU Creamery but on a smaller scale
University Support	\$342,321	general assumption for the time being, moderate component of the annual budget
Gift Shop Sales	\$196,900	based on average sales per SF in the gift shop industry; also roughly 40% of Twin Falls visitors' center revenue
Sponsorship & Naming Rights	\$150,000	based on below median comparisons with similar travel/tourism projects
Other Fundraising	\$110,000	special events and campaigns
Facility Rentals	\$9,750	based on average sales per SF and comparable rental rates at UI main campus
Animal Pavilion & Stall Rental	\$8,750	based on national industry SF-age averages
Admission fees and/or donations	\$7,000	based on assumed # of visitors and donations per visitor
TOTAL INCOME	\$1,611,621	
EXPENSES		
Full Time Employees	\$205,000	3 FT staff
Part Time Employees	\$307,000	8 support FTEs (include students)
Fringe Benefits	\$110,042	assumed at 40.8% per University staff and 8.6% for temporary help, per University requirements
Payroll Taxes	\$39,200	employer shared percentages per IRS standards
Total Personnel Expenses	\$661,242	
Property Taxes	\$0	
Total Property Tax	\$0	
Inventory Costs	\$59,000	merchandise, foods, etc. for the gift shop, based on industry research
Facility Care/Maintenance	\$25,000	
Utilities	\$20,000	per average building usage and Jerome W/S rates
Supplies/Misc. Equipment/Office Expense	\$18,000	
Cable/Internet/Phone/Security	\$17,500	
Auto/Mileage/Travel	\$12,000	expectation of regular trips from Moscow to Jerome
Managed IT Services	\$10,000	
Advertising	\$8,000	
Legal/Professional Fees	\$8,000	
Accounting Fees	\$6,000	average for small business of given revenue size
Insurance	\$3,500	
Bank Fees	\$1,500	

Total Admin/Op Expenses	\$188,500	
TOTAL OPERATING EXPENSES	\$849,742	
EBITDA	\$702,487	
Interest Expense	\$515,799	based on assumed loan
Depreciation	\$214,199	Cost of exterior and site improvements over 40 years
Total Adjustments	\$756,998	
NET PROFIT	(\$54,510)	
Principal	(\$186,688)	Remaining principal at year 5 (assumed stability year)
Depreciation	\$241,199	
Cash Flow	\$0	

Initial Costs of the Facility

Soft Costs and Hard Costs

Estimated soft costs for the Independent Site including architectural and engineering services, design work, site analysis, permit fees, and materials testing total \$1.46M. Estimated hard costs total \$13.1M and include construction costs, site costs, and exhibition costs for a total of \$14.56M. A detailed breakdown of those expenses are listed in Table 19 and Table 20 below.

Table 19: Estimated Soft Costs for Independent Site

Soft Costs	Sq. Ft
Basic Services Total Architectural and Engineering: (9% X \$9,647,947.69)	\$868K
Architect Services	
Engineering Services	
Structural Engineer	
MEP Engineer	
Civil Engineer	
Additional Services	
Landscape Architect	\$5K
Interior Designer	\$5K
Exhibition Designer (Concept & Schematic)	\$550K
Site Analysis	
Survey/Topography	\$3K
Geotechnical	\$7K
AHJ Fees (Agency Having Jurisdiction):	
Permit Fees	\$10K
Construction Administration:	
Materials testing	\$15K
Total Soft Costs	\$1.46M

Source: ZGA Architects

Table 20: Estimated Hard Costs for Independent Site

Hard Costs	\$(K, M)
Construction Costs	\$8.7M
Site Costs	\$948K
Exhibit Costs (50% core @\$400/SF+ 50% changing at \$175/SF)	\$3.4M
Total Hard Costs	\$13.1M

Source: ZGA Architects

Construction Costs

ZGA's design of the Facility at the Independent Site includes a plan for initial construction and future expansion. The initial construction costs are estimated at roughly \$8.7M. The table below gives a snapshot of the estimated costs of initial construction by square footage. More detail about total square footage at full build-out including a comparison to the Collocated Site can be found in Table 12 of [Site Comparisons](#).

Table 21: SF Costs per RS Means Construction Data

Space	Cost/Sq. Ft	Total Cost
Outdoor Cover	4,066 SF x \$177.96/SF (warehouse)	\$ 723,585
Meeting, Kitchen	9,335 SF x \$202.46/SF (restaurant)	\$1,889,964
Retail/CAFE/Office	3,294 SF x \$301.38/SF (office)	\$ 992,746
Display Areas/Circulation	15,999 SF x \$216.72/SF (warehouse)	\$3,467,303
Animal Pavilion	7,584 SF x \$177.96/SF (warehouse)	\$1,349,649
Outdoor Play Area	2,770 SF x \$100.00/SF (estimated)	\$ 277,000
Total Estimated Costs		\$8,700,247

Source: ZGA Architects

Landscaping and Exterior Costs

Exterior improvements to the site are estimated at approximately \$948K which includes earthwork, utilities preparation, and landscaping. A detailed breakdown of those estimates provided by ZGA can be found in [Appendix B](#).

Electrical Usage

Table 22 displays estimated costs for electrical usage at the Facility at initial build-out. These estimates include costs associated with the following indoor heated and conditioned spaces which total 28,648 SF:

- Meeting/Kitchen space
- Retail/CAFE/Office
- Display Areas/Circulation

Estimated electrical costs at full-build out of the Independent Site and the Collocated Site can be extrapolated based on the data in Table 22 but are not included here.

Table 22: Electrical Usage Estimates Independent Site

Indoor Conditioned Spaces: 28,648 SF
Power Consumption: 62,000 W
Energy Price: .08/kW
Usage Time: 10 hours per day, 7 days a week
Power Consumed: 620 kWh/day
Cost: \$1,509.70 per month, \$18,116.40 per year

Source: ZGA Architects

Appendix A: Parcel Details

Parcel Descriptions

Independent Site

Parcel: RP001170010120A

Owner: Board of Regents of the University of Idaho

Legal Desc: Lot 12 Block 1 Crossroads Point Business Center PUD Phase 1 (10-9-17)

Zoning: IMP-COM

Size: 1.62 Acres

Parcel: RP001170010130A

Owner: Board of Regents of the University of Idaho

Legal Desc: Lot 13 Block 1 Crossroads Point Business Center PUD Phase 1 (10-9-17)

Zoning: IMP-COM

Size: 1.03 Acres

Parcel RP001170010140A

Owner: Board of Regents of the University of Idaho

Legal Desc: Lot 14 Block 1 Crossroads Point Business Center PUD Phase 1 (10-9-17)

Zoning: IMP-COM

Size: 1.31 Acres

Parcel: RP001170010150A

Owner: Board of Regents of the University of Idaho

Legal Desc: Lot 15 Block 1 Crossroads Point Business Center PUD Phase 1 (10-9-17)

Zoning: IMP-COM

Size: .93 Acre

Parcel RP001170010170A

Owner: Board of Regents of the University of Idaho

Legal Desc: Lot 17 Block 1 Crossroads Point Business Center PUD Phase 1 (10-9-17)

Zoning: IMP-COM

Size: 1.22 Acres

Total acreage 6.11 acres

Collocated Site

Parcel: RP00117017008AA

Owner: ABC AGRA LLC

Legal Desc: Lot 9 Block 17 Crossroads Point Business Center PUD Phase 1

Zoning: IMP-COM

Size: 1.38 Acres

Parcel: RP001170170100A

Owner: ABC AGRA LLC

Legal Desc: Lot 10 Block 17 Crossroads Point Business Center PUD Phase 1

Zoning: IMP-COM

Size: 1.02 Acres

Parcel: RP002600010060A

Owner: ABC AGRA LLC

Legal Desc: Lot 6 Block 1 Crossroads Point Business Center PUD No 9

Size: 4.21 Acres

Total 6.61 Acres

Appendix B: Detailed Data

Programming and Square Footages

Table 1B: Detailed Square Footage for Independent Site

Building	Sq. Ft
CAFE DC	
Outdoor Cover	4,066
Circulation	4,143
Meeting Spaces	4,338
Offices	1,051
Retail	2,243
Display	11,856
Kitchen and Building Service Spaces	3,662
Restrooms	1,355
Animal Pavilion	7,584
Outdoor Play	2,770
Dormitory	
Living Space	2,813
Classroom/Laboratory	
Facility Space	13,172

Source: ZGA Architects

Table 2B: Parking Calculations Per Space at Independent Site

Space	Calculation	Total Square Footage	# Spaces
Museum/Gallery	1 space/400 SF	11,856 SF	29
Auditorium	1 space/4 seats	233 seats	59
Retail	1 space/250 SF	2,243 SF	9
Office	1 seat/400 SF	1245 SF	4
Laboratory/Classroom	1 space/400 SF	14,417 SF	36
Dormitory	1 space/sleeping area	4 sleeping rooms	4
Minimum # Parking Spaces			141

Other Detailed Data

Table 3B: Detailed Idaho Net Farm Income (\$ Millions), 2011-2020

Revenue Category	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Livestock Production	\$4,004	\$4,058	\$4,639	\$5,492	\$4,574	\$4,280	\$4,374	\$4,324	\$4,792	\$4,762
Crop Production	\$3,292	\$3,725	\$3,495	\$3,299	\$2,890	\$2,950	\$2,959	\$3,152	\$3,238	\$3,714
Farm-Related Income	\$603	\$526	\$642	\$571	\$617	\$539	\$658	\$601	\$558	\$564
Inventory Adjustment	\$147	\$134	\$164	\$65	\$237	\$20	\$16	\$107	\$17	\$75
Government Payments	\$113	\$127	\$129	\$83	\$86	\$130	\$162	\$157	\$165	\$646
Home Consumption	\$12	\$17	\$17	\$14	\$16	\$14	\$16	\$14	\$17	\$17
Total Revenues	\$8,171	\$8,587	\$8,758	\$9,395	\$8,420	\$7,934	\$8,153	\$8,354	\$8,753	\$9,628
Expense Category	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Farm Origin Inputs	\$1,926	\$2,070	\$2,128	\$2,537	\$2,161	\$1,710	\$1,994	\$2,024	\$2,113	\$2,081
Payment to Stakeholders	\$1,240	\$1,247	\$1,315	\$1,294	\$1,160	\$1,249	\$1,500	\$1,489	\$1,182	\$1,118
Manufactured Inputs	\$1,202	\$1,333	\$1,302	\$1,313	\$1,179	\$1,067	\$1,173	\$1,135	\$1,019	\$1,006
Other Inputs	\$1,106	\$1,321	\$1,272	\$1,335	\$1,237	\$1,281	\$1,425	\$1,271	\$1,227	\$1,231
Capital Consumption	\$278	\$462	\$512	\$658	\$587	\$612	\$558	\$482	\$446	\$438
Property Taxes & Fees	\$133	\$155	\$137	\$167	\$142	\$132	\$135	\$128	\$142	\$152
Contract Labor	\$36	\$46	\$59	\$70	\$51	\$78	\$67	\$59	\$74	\$75
Total Expenses	\$5,922	\$6,634	\$6,726	\$7,374	\$6,517	\$6,129	\$6,851	\$6,587	\$6,203	\$6,101
Net Farm Income	\$2,250	\$1,953	\$2,032	\$2,020	\$1,903	\$1,805	\$1,302	\$1,767	\$2,550	\$3,527

Source: United States Department of Agriculture, National Agricultural Statistics Service, 2017

Table 4B: Income from Farm-Related Sources in Jerome County and Twin Falls County Compared to Idaho Totals

Income Category	Jerome	% of State	Twin Falls	% of State	Idaho
Ag Services, Customwork & Other	2,454,000	4.3%	8,405,000	14.6%	57,668,000
Rent, Land & Buildings	4,690,000	4.9%	6,684,000	7.0%	95,083,000
Ag Tourism & Recreational Services	--	--	35,000	0.4%	9,242,000
Patronage Dividends & Refunds from Cooperatives	2,102,000	9.0%	1,519,000	6.5%	23,329,000
Crop & Animal Insurance Payments	--	--	502,000	1.3%	39,878,000
Other Receipts	1,134,000	3.4%	780,000	2.3%	33,368,000
Total Farm-Related Receipts	10,693,000	4.0%	17,935,000	6.7%	266,869,000

Source: United States Department of Agriculture, National Agricultural Statistics Service, 2017

Table 5B: Employment by Selected Industry Sector, Jerome County

NAICS Description	2010	2020	Change	%Change	2020 LO
Agriculture, Forestry, Fishing and Hunting	2,123	2,369	246	11.6%	31.01
Manufacturing	1,303	1,829	526	40.4%	1.97
Retail Trade	912	1,000	88	9.6%	1.13
Transportation and Warehousing	865	809	(56)	(6.5%)	2.49
Wholesale Trade	375	592	217	57.9%	0.68
Accommodation and Food Services	336	471	135	40.2%	0.62
Administrative and Support and Waste Management and Remediation Services	148	413	265	179.1%	0.77
Construction	248	409	161	64.9%	0.78
Health Care and Social Assistance	388	393	5	1.3%	0.38
Other Services (except Public Administration)	158	190	32	20.3%	0.8
Professional, Scientific, and Technical Services	77	125	48	62.3%	0.12
Finance and Insurance	87	98	11	12.6%	0.12
Utilities	57	74	17	29.8%	0.67
Information	80	47	(33)	(41.3%)	0.72
Educational Services	34	31	(3)	(8.80%)	0.23
Grand Total	7,191	8,850	1,659	31.56%	

Source: Points Consulting using United States Census LEHD Quarterly Workforce Indicators

Table 6B: Employment by Selected Industry Sector, Twin Falls County

NAICS Description	2010	2020	Change	% Change	2020 LQ
Agriculture, Forestry, Fishing and Hunting	1,749	1,944	195	11.10%	4.85
Health Care and Social Assistance	4,872	5,804	932	19.10%	1.08
Retail Trade	4,422	4,839	417	9.40%	1.2
Manufacturing	3,270	4,660	1,390	42.50%	1.36
Accommodation and Food Services	2,461	3,839	1,378	56.00%	1.21
Administrative and Support and Waste Management and Remediation Services	1,504	3,127	1,623	107.90%	1.32
Construction	1,321	1,744	423	32.00%	0.86
Transportation and Warehousing	1,332	1,590	258	19.40%	0.98
Wholesale Trade	1,216	1,446	230	18.90%	0.94
Professional, Scientific, and Technical Services	1,365	1,349	(16)	(1.20%)	0.49
Other Services (except Public Administration)	972	976	4	0.40%	0.88
Finance and Insurance	941	916	(25)	(2.70%)	0.57
Information	461	258	(203)	(44.00%)	0.31
Utilities	192	172	(20)	(10.40%)	1.35
Educational Services	142	99	(43)	(30.30%)	0.11
Grand Total	26,220	32,763	6,543	15.21%	

Source: Points Consulting using United States Census LEHD Quarterly Workforce Indicators

Cost Estimate Report

Date: 03/22/2022

UI CAFE exterior

Year 2022

Unit Detail Report

Prepared By: STEVE TURNERY

ZGA ARCHITECTS & PLANNERS

LineNumber	Description	Quantity	Unit	Total Incl. O&P	Ext. Total Incl. O&P
Division 31 Earthwork					
312316130110	Excavating, trench or continuous footing, common earth, 3/4 C.Y. excavator, 4' to 6' deep, excavator, excludes sheeting or dewatering	1,400.00	B.C.Y.	\$5.85	\$8,190.00
Division 31 Earthwork Subtotal				\$8,190.00	
Division 32 Exterior Improvements					
321216140035	Asphaltic concrete paving, parking lots & driveways, 6" stone base, 4" binder course, 2" topping, no asphalt hauling included	97,308.00	S.F.	\$3.95	\$384,366.60
321313250020	Concrete pavement highway, 4500 psi, fixed form, unreinforced, 12' pass, 6" thick, includes joints, finishing, and curing	1,173.00	S.Y.	\$30.34	\$35,588.82
321613130415	Cast-in place concrete curbs & gutters, concrete, machine formed, straight, 6" x 18", includes concrete	3,799.00	L.F.	\$8.82	\$33,507.18
328423100800	Underground sprinklers irrigation system, for lawns, residential system, custom, 1" supply	92,200.00	S.F.	\$0.89	\$82,058.00
329119130700	Topsoil placement and grading, loam or topsoil, screened, 4" deep, furnish and place, truck dumped	10,244.00	S.Y.	\$5.08	\$52,039.52
329223100300	Sodding, bluegrass sod, on level ground, 1,000 S.F.	92.00	M.S.F.	\$732.47	\$67,387.24
329343300650	Deciduous trees, acer platanoides, (Norway Maple), B&B, zone 4, 3" to 3-1/2" caliper	44.00	Ea.	\$285.48	\$12,561.12
329343406703	Conifer trees, pinus monticola, (Western White Pine), B&B, zone 6, 7' to 8'	8.00	Ea.	\$131.04	\$1,048.32
Division 32 Exterior Improvements Subtotal				\$668,556.80	

Division 33 Utilities					
331413252120	Water supply distribution piping, piping polyvinyl chloride, class 150, 2" diameter, excludes excavation or backfill, unless specified	729.00	L.F.	\$1.94	\$1,414.26
331413252200	Water supply distribution piping, piping polyvinyl chloride, class 150, 6" diameter, excludes excavation or backfill, unless specified	500.00	L.F.	\$10.82	\$5,410.00

LineNumber	Description	Quantity	Unit	Total Incl. O&P	Ext. Total Incl. O&P
331419302160	Water utility distribution fire hydrant, two way, 6'-0" depth, 5-1/4" valve, includes mechanical joints, excludes excavation and backfill	2.00	Ea.	\$5,305.41	\$10,610.82
333111252120	Public sanitary utility sewerage piping, piping polyvinyl chloride pipe, B & S, 13' lengths, 10" diameter, SDR 35, excludes excavation or backfill	750.00	L.F.	\$19.78	\$14,835.00
334123190100	Geotextile subsurface drainage filtration, fabric, laid in trench, polypropylene, ideal conditions	700.00	S.Y.	\$2.73	\$1,911.00
334211501020	Public storm utility drainage piping, drainage and sewage, corrugated HDPE, type S, bell and spigot, with gaskets, 8" diameter, excludes excavation and backfill	750.00	L.F.	\$7.56	\$5,670.00
Division 33	Utilities Subtotal				\$39,851.08
Subtotal					\$716,597.88
General Contractor's Markup on Subs					
				15.00%	\$0.00
Subtotal					\$716,597.88
General Conditions					
				15.00%	\$107,489.68
Subtotal					\$824,087.56
General Contractor's Overhead and Profit					
				15.00%	\$123,613.13
Grand Total					\$947,700.69

Appendix C: Design Renderings and Site Plans

This section includes the following:

- ZGA Architecture Site Plan
- ZGA Architecture Elevations
- ZGA Architecture Floor Plan
- Southern Idaho Legacy Centre: Architecture Site Plan (Master Plan)
- Southern Idaho Legacy Centre: Site Plan (Focused on Discovery Center)
- Southern Idaho Legacy Centre: Upper and Lower
- Southern Idaho Legacy Centre Elevations

ZGA Site Plan: Independent Site



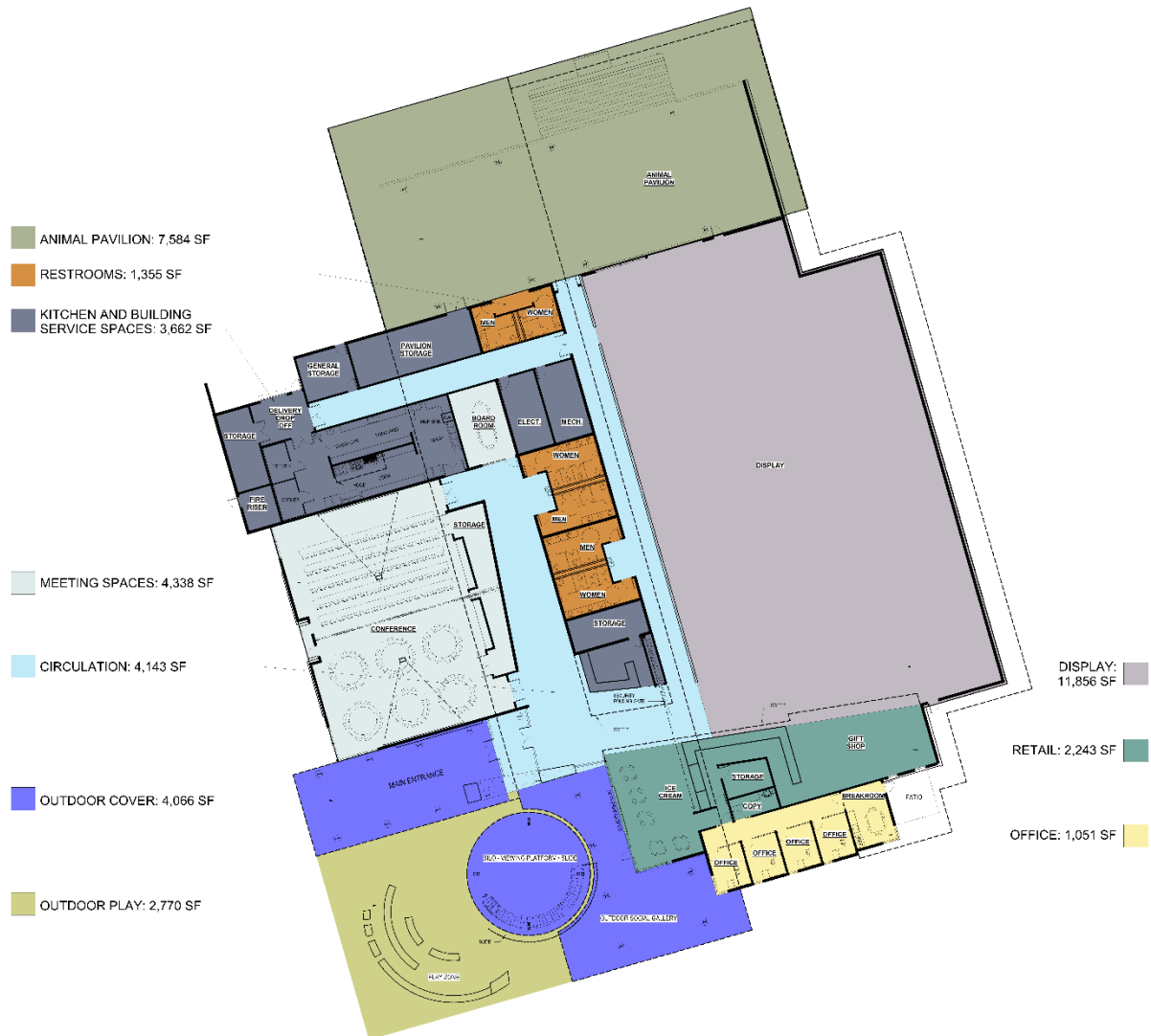
ZGA Elevation 1: Independent Site



ZGA Elevation 2: Independent Site



ZGA Architecture: Floor Plan Independent Site



Southern Idaho Legacy Centre: Architecture Site Plan (Master Plan)



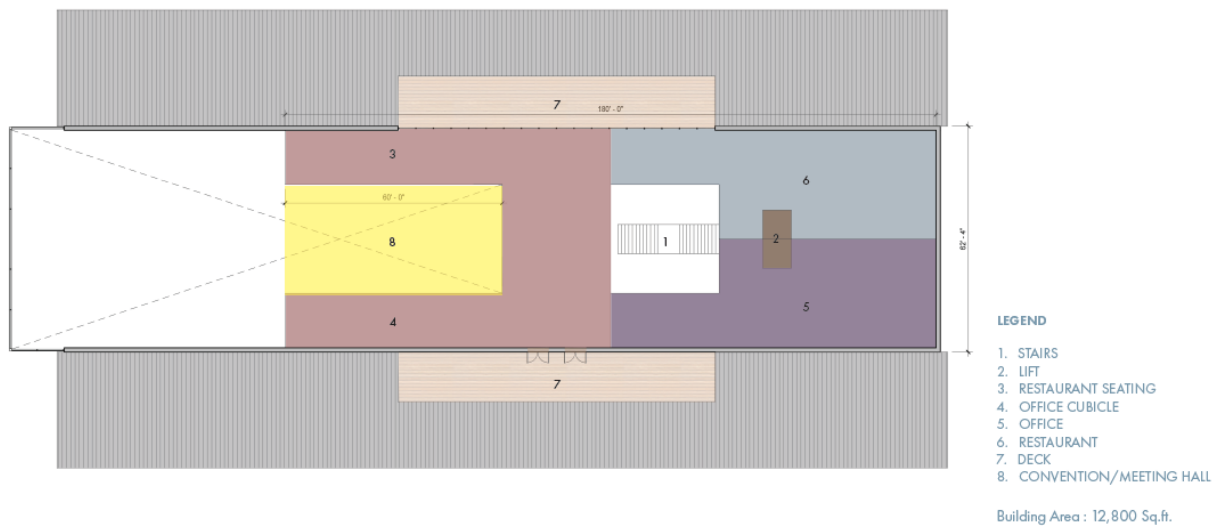
Southern Idaho Legacy Centre: Site Plan (Focused on Discovery Center)



Southern Idaho Legacy Centre, Food Hall: Lower



Southern Idaho Legacy Centre, Food Hall: Upper



Southern Idaho Legacy Centre Elevations

