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Phone: (860) 828-7003

April 29, 2021

Arosha Jayawickrema, Town Manager
Town of Berlin
240 Kensington Road
Berlin, CT 06037

Re: NGF Consulting Services for Town of Berlin

Proposal #221015

Dear Arosha:

It was nice speaking with you about the Town of Berlin's ("City") consulting needs relative to its 18-hole municipal golf facility, Timberlin Golf Club ("Timberlin GC"). National Foundation Consulting ("NGF", or "NGF Consulting") appreciates your consideration of our firm to help assess operations and capital needs with the ultimate goal of developing strategies to make the golf facility better and help ensure its long-term financial sustainability.

Based on our initial discussion several weeks back, we understand that the Town Charter dictates that the Golf Enterprise Fund be self-sustainable through user fees. NGF sees its role as assisting the Town with strategic planning and "visioning" for Timberlin GC, including best business practice recommendations relative to operations, capital investment, and potential new revenue opportunities. Our proposed study will include, but not be limited to: market analysis; physical review of assets; stakeholder/customer engagement; and operations review. The latter component will comprise elements such as: pricing (daily fees, passes, etc.); marketing & promotions; staffing levels; customer service standards; use of technology; lessons & programs; staffing; merchandising; and, food & beverage services. Deliverables to the Town will include both operating "best practice" recommendations, as well as prioritized capital improvement plan.

The National Golf Foundation and its Consulting division have more experience than any firm in the country in working with public sector clients to achieve their objectives with respect to their golf course assets. NGF has worked with hundreds of municipalities across the United States over the years. Municipal clients in the northeast / New England have included the cities of Groton, CT; Norwalk, CT; Hartford, CT (as subcontractor); White Plains, NY; and the City of New York. Other public agency clients include Bergen County, NJ, the Township of River Vale, NJ, and the towns of Wallingford, CT, and Brewster and Barnstable in Massachusetts.

Arosha, we appreciate the opportunity to present our qualifications and proposed scope of services for this project, and hope to get the chance to work with you and the Town.

NATIONAL GOLF FOUNDATION CONSULTING, INC.

A Subsidiary of the National Golf Foundation

501 N. HIGHWAY A1A, JUPITER, FL 33477 • (561) 744-6006 • FAX: (561) 744-9085 • www.ngf.org

SCOPE OF SERVICES

Proposed study elements will include, but not be limited to:

- ▶ **Project Coordination and Kick-Off Meetings** – The NGF consultant will travel to Berlin (pandemic-permitting) to attend meetings and coordinate the field research phase of the engagement. During this time the consultant will meet with Town staff to review the scope of work set forth in this proposal. The kick-off meetings will include an initial presentation by NGF that will outline the scope of services and project approach. This process will be repeated as needed throughout the project in order to discuss any necessary refinements to the scope. For each golf facility, the NGF team will do an on-site tour, conduct interviews with key staff, and collect documentation on the recent historical performance.
- ▶ **Facility Physical Assessment** – NGF Consulting, working with a golf course architect, will perform an inspection of Timberlin Golf Club (including tees, greens & surrounds, fairways, bunkers, driving range/practice amenities, water features, etc.) buildings/structures, and maintenance equipment for the purpose of establishing current physical condition and needs. Pace of play will also be examined within the context of the physical course layout. Based on our assessment, the NGF team will create a prioritized list of recommended short-, mid- and longer-term improvements, including a preliminary cost estimate range for each component.
- ▶ **Golf Operations Analysis and Recommendations** – NGF will thoroughly review operations at Timberlin GC to attain the data and information required to make informed analyses and recommendations regarding future operations, and to produce cash flow projections for the facility. This phase of the study, which will include meetings with key golf course operations and maintenance staff such as Managers, Golf Professionals, and Superintendents, will allow us to ascertain the extent to which “best business practices” have been implemented and to make overall operational recommendations aimed at improving economic performance. The analysis will include, but not be limited to, a review of:
 - Rounds played by type (daily fee, member, complimentary, etc.)
 - Financial results (e.g., P&L statements)
 - Operating margins
 - Budgeting processes
 - Fees / market positioning
 - Marketing, promotional and direct selling activities and strategies
 - Revenue center performance (e.g., merchandising, driving range, food & beverage)
 - Staffing levels and requirements (golf operations and course maintenance)
 - Use of technology (POS, tee time reservations, website, social media, etc.)
 - Customer service policies and mechanisms
 - Programs in place (lessons, clubs, tournaments, juniors, etc.)
 - Pace of play management

- ▶ **Analysis of Operating Structure Alternatives** – NGF will evaluate relevant options available for the operation of Timberlin GC, including full self-operation (public employees), fee-for-service management contract, and private concession model. Analysis will include a discussion of the relative advantages, disadvantages, expected financial outcomes, and public policy implications of each structure.
- ▶ **Market Analysis** - NGF will perform a thorough review of the public access golf market in the Berlin/west-central Connecticut area. We will document relevant local competition in terms of relative quality, as well as green fee and activity level trends, so that we can identify the appropriate price value proposition for Timberlin GC, as well as any opportunities to drive additional revenues. We will also utilize NGF’s proprietary GolfMAP program to profile the local/regional golf supply-demand dynamic and to identify demographic and economic trends that may impact continued operation of the golf course.
- ▶ **Assessment of Revenue Opportunities** – Based on our facility reviews, market analysis, and meetings with Town & golf course staff, NGF will identify potential viable opportunities to increase revenues at Timberlin (e.g., meetings/banquet, merchandising, events, programs, new amenities). NGF will focus on those opportunities that are most likely to have the best return on the investment in necessary resources.
- ▶ **Stakeholder Engagement** – NGF will implement our proprietary golfer survey program (GolfSat) to gauge customer opinions, satisfaction levels, other golf courses where they play, etc. At Town request, we will meet with representatives of applicable clubs, such as Men's / Ladies' / Seniors.
- ▶ **Financial Projections** - Based on the results of our overall analysis, NGF will provide 5-year rounds played and financial projections for Timberlin Golf Club under two scenarios – “as is” operation, and under the assumption that key NGF operational and capital improvement recommendations are implemented.

PROJECT DELIVERABLES

NGF Consulting anticipates frequent communication with appropriate Town staff during the course of this engagement. Deliverables to the client for this project include:

- ▶ Consultant activities in-market at Town offices and at Timberlin GC, including meetings and presentations with Town staff and officials, golf course operations staff, and key stakeholder groups, as applicable.
- ▶ Interim virtual (Zoom, Microsoft Teams, or similar format) meetings / presentation(s) to discuss study progress.
- ▶ A written report containing key findings, recommendations, and financial projections. A draft version of the document will be made available to the Town for review and comments. Upon authorization, an electronic version of the final report will be delivered.
- ▶ After the final report is approved, the lead NGF consultant will be available to make a formal PowerPoint presentation of findings to Town Council and/or the Golf Commission. (Professional fees assume a virtual presentation).

PROFESSIONAL FEES AND TIMING

To complete this engagement, the NGF team proposes a professional fee of **\$22,000**. This fee does not include direct project expenses associated with the initial field visit to Berlin, CT for kickoff meetings, field research, meetings with stakeholder groups, etc. NGF will bill travel expenses at cost; the total will not exceed **\$3,000** without advance approval from the Town.

The timing of the draft report delivery is contingent on the commencement date of the study and the timing of the field visit. NGF estimates draft written report delivery within 14 to 16 weeks of completion of the initial field visit, with full completion of project – including final presentation to the Town – contingent on when we receive feedback from Town and golf course staff.

ACCEPTANCE

Acceptance of this proposal may be indicated by signing one copy and returning it to NGF Consulting's Jupiter office. A Town of Berlin contract or purchase order will be utilized to bind the parties. The billing procedure for NGF will comply with Town regulations and assumes billing for services as completed on a monthly basis.

Arosha, thank you for considering NGF Consulting for the Town's due diligence needs related to Timberlin Golf Club. I look forward to answering the questions of the Town Council and the Golf Commission.

Sincerely,



Ed Getherall
Director of Consulting Services
561-354-1650
egetherall@ngf.org

Acceptance _____ Date _____

NATIONAL GOLF FOUNDATION QUALIFICATIONS

The NGF's work is supported by a base of approximately 3,500 members representing every facet of the industry: public and private golf facilities; Golf Resort architects; developers and builders; companies offering specialized services to the golf industry; national, regional, state, and local golf associations; instructors; schools, and individuals. Our most important research is published and distributed annually, quarterly and monthly, and includes: *Golf Participation in the U.S.*, *Golf Facilities in the U.S.*, *The Future of Public Golf in America*, *Golf Industry Overview*, *Golf Travel in the U.S.*, *National Golf Rounds Played Report*, *A Strategic Perspective on the Future of Golf*, and *Operating & Financial Performance Profiles of Golf Facilities in the U.S.*

There is no greater authority than the NGF on the economics of supply and demand in the business of golf. The NGF's exclusive Golf Demand Model provides best-in-class data on every U.S. market and is utilized by many clients to improve both forecasting and customer targeting. The NGF's database of U.S. golf facilities is the industry's gold standard and is licensed by the USGA, PGA of America, Club Managers Association of America and the Golf Superintendents Association of America, as well as private enterprise such as Weather.com and NAVTEQ.

The NGF's Consulting Division was established in 1987 and has conducted more than 950 assignments throughout North America, plus Europe, Asia, the Caribbean, and South America. Over the last five year alone, NGF Consulting has conducted 140+ studies, two-thirds of which were for public agencies. These engagements cover a broad spectrum of services, although assistance to municipalities operating golf facilities has become the landmark service for which the NGF consultants are most well-known. Since the NGF is not involved in the design, construction, or operation of golf facilities, we are able to provide our clients with completely independent advice.

All consulting work is conducted under the direction of **Richard B. Singer**, MBA, Sr. Director of Consulting Services, and **Ed Getherall**, MBA, Director of Consulting Services at the National Golf Foundation. Other staff members work as part of the study team in providing professional insight, gathering additional data, applying participation models, conducting financial analyses, and reviewing the written report. Resumes of key professional staff appear on the following pages.

Specific skills and special knowledge provided by NGF to assist with golf operations include:

- **Syndicated Industry Market Research** – The NGF provides on-going research to the golf industry, with annual reports on golf participation, golf facilities, golf industry sales (clubs, bags, apparel, equipment, etc.), golf travel, and other topics.
- **Custom Market Research** – The NGF provides custom research to select clients on issues ranging from new golf product launches, retail site locations, golf consumer behavior, and market size and impact.
- **GolfMAP** – The NGF provides localized golf market research to identify the specific characteristics of local market areas, identifying the potential golf demand and supply balance for any localized geography. This tool is used by NGF in many of our research and consulting engagements, but is also available for other companies and consultants to use on a license basis. As such, whoever the City retains for this review, it is likely that NGF golf market data will be used.
- **Golf Consumer Surveys** – The NGF is active in surveying golfers on a wide range of topics, many that will relate to the continued success of the Northbrook Park City's golf courses.

- **Custom Golf Facility Consulting** – A hallmark of NGF services includes our custom consulting practice providing services in support of golf facility success. These customized consulting projects include services such as:
 - Review of operations and strategic planning for golf facilities
 - Review of management and financial analysis of golf facilities
 - Review of golf facility maintenance and best practices
 - Feasibility studies for new facility development or acquisition
 - Research to support changes to golf facility amenities
 - Consulting in support of golf facility transactions
 - Estimates of value for golf facilities

KEY PERSONNEL

Richard B. Singer, Senior Director of Consulting Services

Richard Singer first joined the National Golf Foundation (NGF) consulting staff in 1989 after completing his Finance MBA at the University of Florida, and was named Director of Consulting Services in 1997 and Senior Director in 2015. Mr. Singer has successfully managed the NGF's well-known golf consulting practice with an industry-respected track record of success and a reputation for delivering projects on time and on budget. Mr. Singer is now widely viewed as the leading municipal golf facility consultant available in the United States.

Experience

Mr. Singer's background includes hands-on experience in the following functional areas:

- | | | |
|-------------------------------------|----------------------------|--------------------------|
| -Golf Facility Feasibility Analysis | -Financial Analysis | -Golf Business Valuation |
| -Golf Operations Consulting | -Business Plan Preparation | -Golf Market Analysis |
| -Economic Impact Analysis | -Clubhouse Programming | -Golf Club Marketing |
| -Golf Course Master Planning | -Public Presentations | -Proposal Writing |
| -Expert Witness | -Golf Course Brokerage | -Portfolio Analysis |

National Golf Foundation Consulting Experience – During his tenure with NGF Consulting, Mr. Singer has been responsible for preparing over 400 research studies for specific projects related to golf facilities. Mr. Singer is a widely recognized expert and frequent speaker on subjects related to golf facility development, operation, management, finance and transactions. In his 30 years as a golf consultant, Mr. Singer has visited and/or profiled more than 3,000 public and private golf facility operations in the United States and internationally. Mr. Singer also has extensive experience as an expert witness in matters related to golf facility operation, providing litigation assistance to golf course owners in civil litigation.

Golf Facility Operations and Marketing Consulting – Mr. Singer's golf facility operations consulting assignments comprise all aspects of golf facility operations, with focus on improving profitability through revenue enhancements, improved marketing and expense control. A significant aspect of golf operations consulting in the 2010s has been finding ways to preserve failing golf courses through physical and marketing enhancement, as well as considerations for assistance in re-purposing golf courses to some alternate (non-golf) use.

Golf Facility Development/Acquisition Consulting – In his 30 years with NGF Consulting, Richard Singer has become one of the most experienced golf facility development and acquisition consultants available today. His extensive experience includes services to support new golf facilities (feasibility studies, site master planning, business plans, etc.), and services to support transactions (acquisition due diligence, brokerage support, golf facility sale preparation, etc.). Through the last half decade, Mr. Singer has completed several consulting engagements involving homeowner associations ("HOAs") or community development districts ("CDDs") seeking to acquire and effectively market and manage community golf facilities.

Alternative Golf Facility Consulting – Mr. Singer's consulting services for alternative golf facilities have included both new development and operational reviews for driving ranges, putting courses, miniature golf courses, golf learning centers, executive/par-3 courses, and various combinations with other facilities. He co-authored the NGF publication *How to Plan, Build and Operate a Successful Golf Range*.

Key Accounts Managed

Selected public sector clients in 2014-2019 include: Federal City, D.C. (3-facility review of operations and capital planning); State of Georgia (7-course review of operations and outsource assistance); City of Dayton, OH (3-facility operations review and re-purpose considerations); United States Air Force (On call to review golf operations); City of Detroit (4-course strategy to keep City courses open); Town of Oro Valley, AZ (golf reduction / partial re-purpose plan); Jekyll Island Authority, GA (golf master plan preparation); City of Burbank, CA (golf facility operations review and lease preparation); City of Auburn, WA (clubhouse review); City of Casselberry, FL (Private club acquisition); Borough of Sea Bright, NJ (beach/pool club development); City of Coronado, CA (GC performance benchmarking); the Town of Barnstable, MA (new investment feasibility); Martin County, FL (Emergency take-over assistance); Forest Preserve District of Cook County, IL (11-course operations / sustainability review). These public sector projects include extensive participation in public meetings and a defense of project work.

Selected private sector clients in 2008-2019 include: Tiburon Golf Club and Porter's Neck Golf Club (expert witness – club defense); The Pointe Lake and Golf Club (strategic plan); Bear Lakes CC (new amenities feasibility); Heritage Isles CDD (clubhouse program plan); Verdict Ridge CC (member-acquisition analysis); Fleming Island CDD (rate study); Nicklaus Golf Companies (business plan review); The Moorings Club (market positioning analysis); Walt Disney Imagineering (strategic plan for golf); The Trump Organization (private club lease analysis); Bonita Bay Properties (strategic plan for golf); Dartmouth College / Hanover CC (sustainability analysis); US Naval Academy Golf Club (review of operations); Mariner Sands CC (new amenity feasibility); Legacy GC (expert witness in HOA civil case); and Mahogany Run GC (St. Thomas, USVI – acquisition analysis).

Representative alternative facility clients in 2005-2019 include: Greens of Las Vegas, Inc. (new facility feasibility); Golden Bear International (new facility feasibility); City of Lake Oswego, OR (par-3 course reconfiguration and range expansion); Bores Group, MI (new high-end driving range feasibility); City of Ft. Lauderdale, FL (par-3 facility on landfill feasibility); City of Plantation, FL (litigation support); Gambrell & Stoltz (Macon, GA – expert testimony); City of Indian Wells, CA (new golf entertainment feasibility); Oak Hills Park District, CT (new driving range feasibility); and City of Bettendorf, IA (new par-3 course and range).

Representative regional market and economic impact clients in 1999-2019 include: the State of West Virginia (Statewide 'Golf Trail' study); State of Oklahoma (Statewide Economic Impact Study); Bonita Bay Properties; *Golf 20/20* – Raleigh-Durham MSA Study; GATX Capital Golf Group; C. Cabot Incorporated; Gunster, Yoakley, Valdes-Fauli & Stewart, P.A.; Public Finance Consultants Inc.; and Morgan Stanley – Dean Witter.

International Experience

Mr. Singer's professional resume includes golf facility consulting on projects located in the countries of Canada, Sweden, South Korea, Egypt, United Arab Emirates, Dominican Republic, Anguilla (BWI), US Virgin Islands, St. Marten, Brazil, Bahamas, and Chile.

Background/Education

Mr. Singer is a long-time resident of Palm Beach County, Florida and grew up around the North Palm Beach Country Club. He earned his Bachelor's degree in marketing and Insurance from the University of Florida in 1985, and worked as a financial consultant for Northwestern Mutual Life and Baird Securities before earning an MBA in Real Estate Finance from the University of Florida in 1989. Mr. Singer is a Licensed Real Estate Broker in Florida (Lic. #BK3077126) and is a member of the Palm Beach County Sports Commission and a Citrus Bowl scout.

Edward Getherall, Director of Consulting Services

Ed Getherall joined the NGF Consulting staff as Project Analyst in 2000 after several years of subcontracting consulting services to the NGF. Mr. Getherall, who was promoted to Senior Project Director in 2001 and Director of Consulting Services in 2015, has been instrumental in cementing NGF Consulting's status as the leader in municipal golf facility consulting, with a particular focus on improving municipal golf course marketing and making smooth transitions to alternative operating structures for their golf systems.

Mr. Getherall has also directed NGF's effort to be the leading industry resource for accurate golf market information pertaining to facility activity levels, revenue center performance, and green fee levels and trends. Since joining NGF Consulting, Mr. Getherall has become a respected industry authority on food & beverage operations, clubhouse renovation / replacement, municipal golf management alternatives, outsourcing assistance (RFP preparation / analysis of responses / contract negotiations), and other areas of expertise.

NGF Consulting Projects Experience

Mr. Getherall's extensive business and marketing background has enhanced NGF Consulting's ability to provide expertise to the facility segment of the golf industry. In 20 years in NGF's Consulting division, Ed has been the lead project director for more than 150 consulting assignments, covering a broad range of services, including public and private golf course feasibility studies, acquisition studies, operations reviews, golf-related real estate absorption analyses, pricing / market positioning analyses, and clubhouse renovation studies.

Partial List of Clients

City of Houston, TX	City of Palm Springs, CA	Union League of Philadelphia
Toll Brothers Golf, PA	Lake County (IL) Forest Preserve District	Google (Planetary Vent.), CA
City of Alameda, CA	City of Norwalk, CT	City of Greeley, CO
City of Omaha, NE	City of Yonkers, NY	City of Helena, MT
City of New York, NY	City of San Diego, CA	Woodbridge Township, NJ
Fairfax County, VA	City of Portland, OR	Federal City Council, D.C.
Miami-Dade County, FL	Ft. Belvoir GC (U.S. Army), VA	Palm Beach County, FL
City of Las Vegas, NV	Municipality of Anchorage, AK	City of Reno, NV
City of Lake Havasu, AZ	City of Tempe, AZ	City of Oakland Park, FL
Kealakehe Ahupua'a 2020, HI	City of San Francisco, CA	US Dept. of Defense, D.C.
City of Mission Viejo, CA	Mecklenburg County, NC	Santa Clara County, CA

Background/Education

Prior to joining the NGF, Mr. Getherall held several positions in the business community including extensive marketing work for such organizations as South Florida Blood Banks, Inc., the Florida Lottery, and the American Cancer Society. His areas of expertise cover a broad spectrum of marketing activity, including research, product management, and special event planning and consulting.

Mr. Getherall earned his M.B.A. from the University of Florida with a concentration in finance. Ed also achieved his undergraduate degree at Florida with a B.S. in Business Administration (Marketing). With a diversified educational and professional background in both marketing and finance, Mr. Getherall has the experience and knowledge to assist in all aspects of golf facility management, marketing, operations, and development.

Jodi Reilly, Consulting Administrator

With eight years client services experience at the National Golf Foundation and more than 17 years of golf facility experience, Mrs. Reilly brings extensive knowledge of municipal, upscale public, semi-private and private club experience to NGF. She currently manages support services for the Consulting / Research division and specializes in coordinating responses to government Requests for Proposals (RFPs) and the administrative aspects of contract compliance. Mrs. Reilly provides assistance in market research and prepares GolfMAP statistical reports for NGF members and clients.

Background and Education

Prior to joining the NGF, Mrs. Reilly held several positions in the Philadelphia Section including: owning the pro shop at Twining Valley Golf & Fitness Club, Dresher, PA; Golf Operations Concierge at Philadelphia Cricket Club, Flourtown, PA; Buyer and Outing Coordinator for Blue Bell Country Club, Blue Bell, PA; Marketing Director for Center Valley Club, Center Valley, PA. In 1997, she earned a Bachelor of Science degree in Graphic Design from the Pennsylvania College of Technology.

Kevin McLendon, Program Director – Golfer Survey Program

Kevin McLendon enjoys over 15 years' experience at National Golf Foundation and currently serves as Director of Database Services and Program Director of NGF's Customer Satisfaction Products. Mr. McLendon provides his expertise in the design, implementation, interpretation, and data analysis of NGF's Golfer Survey Program and GolfSAT products.

NGF Projects Experience

A foremost expert in the disciplines of customer satisfaction and direct marketing, Kevin is adept at walking clients through the implementation of the Golfer Survey Program, and analyzing and interpreting their customer survey data. Kevin's analysis of survey results helps golf facility operators identify strengths and deficiencies and formulate an action plan designed to improve performance.

Mr. McLendon's recent clients include:

Golf Plus Inc, DBA, Bloomingdale Golf Club	KemperSports
Weibring Golf Club at Illinois State University	U.S. Air Force Services
Premier Golf Centers, LLC	Cleveland Metroparks
Poppy Holding, Inc.	Honours Golf
Chomonix Golf Course	CourseCo
Bald Head Island Club	TPC Tampa Bay
Sagamore Hampton Golf Club	Sirius Golf Advisors, LLC
Fort Mill Golf Club	Augusta Ranch Golf Club
Tumwater Valley Municipal Golf Course	City of Phoenix Parks, Recreation & Library
Decatur Park District	City of Berlin, Community Resources Department
Sagamore Golf Center	Great Northern Golf Co.
Leroy Springs & Company, Inc.	WinStar Golf Course

Background and Education

Kevin received his Bachelor's degree in Political Science from Furman University in 2001 and his Masters of Business Administration from Florida Atlantic University in 2009. Prior to his formal education and joining the NGF, Kevin held several positions at Jericho National Golf Club in New Hope, PA.

REPRESENTATIVE STUDIES & REFERENCES

Following are a few examples of recent work in Connecticut and/or of a nature similar to that proposed for the Town of Berlin, with a brief description of the work completed by NGF Consulting and the contact person at the time of the engagement.

Town of Barnstable, MA- Hyannis Golf Course

Operations Review, Business Plan Assistance, and Renovation Feasibility Analysis

NGF Consulting was retained by the Town of Barnstable to evaluate the current condition and market potential of the Town-owned Hyannis Golf Course, in light of specific improvements proposed for the facility. The Town is considering a restoration program to improve the condition and playability of the Hyannis GC, and sought an industry expert to better understand the realistic economic potential of the golf course after rehabilitation, given market and site realities. NGF projected the potential impact of Hyannis GC upgrades on both the subject property and the Town's other golf course - Olde Barnstable Fairgrounds Golf Course. The Town utilized the results of the market and facility analysis to help determine the appropriate course of action.

Client: Bruce McIntyre, Director of Golf Operations
Town of Barnstable
1460 Prospect Street
Marstons Mills, MA 02648-1972
bruce.mcintyre@town.barnstable.ma.us

Mohegan Sun Tribe – Mohegan Sun Golf Club – Baltic, CT

Market Analysis & Phase I Feasibility Analysis – 9-Hole Golf Expansion

The Mohegan Sun Tribe retained NGF Consulting in 2016 to study the feasibility of a potential 9-hole addition to the 18-hole Mohegan Sun Golf Club in Baltic, CT. The new nine holes would be located on a 46-acre tract of land adjacent to hole #13. NGF had previously worked for the Tribe in the winter of 2001-02 when it was considering the development of a new 18-hole facility west of Route 32. The NGF was hired to help the Tribe understand the market and financial implications of expanding the golf club to 27 holes, including projections for incremental rounds played, revenues and expenses if the study should proceed to Phase II.

NGF's preliminary investigation of market factors, such as the relative lack of high-quality public golf in the area and the natural demand driver that is the Mohegan Sun Casino Hotel, indicated that a new high quality golf club - owned by and proximate to the casino on an attractive piece of land - should be able to generate rounds played and average rate that would give the facility a good chance of achieving operational financial break even. However, the variables of construction costs - and land use opportunity cost if the project is done on the newly acquired Norwich Hospital site - made projecting the overall economics of a new golf course highly speculative without further study

Client: Philip Krick, Jr., Vice President and General Manager
Mohegan Sun Golf Club
Baltic, CT
860.862.9230
pkrickjr@mohegansun.com

Oak Hills Park Golf Course – Norwalk, CT

Business Plan & Financial Analysis for Driving Range and Training School

The Oak Hills Park Authority in Norwalk, CT, retained NGF in 2015 to perform a financial analysis for the construction of a proposed new golf driving range and learning center at the Oak Hills Park Golf Course. This review included a comprehensive evaluation of the subject course, the proposed two-phased plan of improvements, and analysis of the external market environment.

Based on the study findings NGF Consulting recommended more a detailed engineering review be completed to determine the exact structure size that can fit into the selected range site and meet basic golf industry safety and ease-of-play standards. NGF also recommended proceeding only if the proposed full 36-bay driving structure could fit the selected property with lights included for night use, and the total development cost could be kept below \$3.0 million. NGF emphasized the need to adopt an aggressive promotion and marketing program immediately to generate maximum exposure.

Client: Ernie DesRochers, Chairman
Oak Hills Park Authority
165 Fallow St
Norwalk, CT 06850-2300
(203) 838-0303
edesrochers@northmarq.com

City of Sioux Falls Golf System – Sioux Falls, SD

Operations Review and Outsourcing Assistance – 3 facilities

National Golf Foundation Consulting was retained by the City of Sioux Falls (“City”) to provide due diligence related to its three-facility municipal golf operation, comprising 27-hole Elmwood Golf Course, 18-hole Prairie Green Golf Course, and 9-hole executive Kuehn Park Golf Course. NGF was brought in to provide strategic guidance to the City in light of recently completed renovation to Elmwood, escalating operating losses that necessitated the abatement of rent payments, and the contract for the long-time lessee coming up for renewal. We provided a series of physical plant and operational recommendations, focusing on management structure and marketing.

Based on NGF recommendations, the City switched to fee-for-service management (formerly operating lease) and had a new national management firm in place beginning in 2018. The City and the vendor have also implemented NGF’s recommendation to more aggressively market the City courses, especially through the planned new Holiday Inn Express on the Elmwood Golf Course property, and the Convention Center, which also directly proximate to Elmwood.

Contact: Matt Newman, Business Analyst
City of Sioux Falls
224 West Ninth Street, PO Box 7402
Sioux Falls, SD 57117
(605) 978-6881
mnewman@siouxfalls.org

City of Helena, MT – Bill Roberts Municipal Golf Course

Operations Review and Feasibility of Proposed Improvements

In spring 2016, the City of Helena retained NGF Consulting to assist the City in shaping a realistic vision for the future of BRGC. NGF is providing planning and evaluation services that will result in business recommendations and a cost-benefit analysis of potential capital projects. The key component of the NGF study is to evaluate the feasibility of a new state-of-the art clubhouse, which would be built to make Bill Roberts a year-round attraction in Helena with the presence of golf simulators, video poker gaming machines, and other entertainment-based amenities aimed at attracting a young adult ('Millennial') clientele.

This study commenced in June 2016. NGF findings and recommendations will be used to help prepare a workable business plan to enhance operations, improve efficiencies and maximize facility economics so that it is sustainable for the long term. The City adopted key NGF recommendations in September 2016, including construction of a new clubhouse building (pending cost estimates by bidders). *Bill Roberts' new clubhouse, including Munis Sports Grille and several golf simulators, opened in the summer of 2018 and has had exceptional success and high utilization rates.*

Contact: Scott Longenecker, Manager
City of Helena Parks & Recreation Department
Bill Roberts Municipal Golf Course
2201 N. Benton Ave.
Helena, MT 59601
(406) 442-2191
slongenecker@helenamt.gov

Boone County, KY

Operations Review – 2 facilities

NGF Consulting was retained by the Boone County Fiscal Court, Burlington, KY to evaluate the County's municipal golf courses, Lassing Pointe and Boone Links. The engagement included a strategic look at the County's overall golf offering, with specific review of the physical condition and operating structure of the two courses. NGF considered the physical condition of the golf course and clubhouse facility at Lassing Pointe and Boone Links, the market environment in which the facilities operate, and alternatives for continued operation. NGF Consulting's recommendations included forgiving the golf fund deficit, reinvesting in additional staff, enhancing marketing, reducing reliance on green fee price discounting, completing needed physical upgrades, and conducting a further study on options to replace the clubhouses at both courses. This study was completed in the summer of 2015.

Subsequent to the study, the County has enacted many of NGF's recommendations, including a major renovation of the Boone Links clubhouse completed in 2019. The reimagination of the clubhouse and surrounding areas included expanded dining room, 18-hole miniature golf course, two-bay golf simulator lounges, bridal suite, enhanced outdoor spaces including a large gazebo, stone fireplace, separate vestibule for food service, and A/V-Equipped small meeting space.

Contact: Russ Gartner, Director of Golf Operations
Boone County Fiscal Court
19 Clubhouse Drive
Florence, KY 41042
(859) 334-4855
rgartner@boonecountyky.org