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*Leatherstocking Golf Course
The Otesaga Resort Hotel
Cooperstown, New York*

Golf Business Advisors 2020 and Beyond

Golf Business Advisors is celebrating 28 years in business in 2020 and it is still a rewarding challenge to assist our clients in meeting their objectives in the golf industry.

With 17 years of sports and hospitality management and marketing experience at Kingsmill Resort and a yearning for entrepreneurship, I opened the doors of **Golf Business Advisors** in late 1992. Over the past 27 years, we have assisted over 350 clients in meeting their objectives and achieving success in the golf industry.

Enjoy this Newsletter which highlights some of our client work and our website www.golfbusinessadvisors.com has additional information including a few interesting case studies. This is a people business and the vast majority of our new clients come from referrals from past clients and golf industry friends. If we can assist you or if you have a referral to pass along, please give me a call to discuss.

Thank you and best wishes for success in 2020 as our nation gets back on track and we navigate through the return to normalcy at our golf and country clubs.

Our recent clients include the following:

National Park Service – Washington, DC
James River Country Club – Newport News, VA
The Otesaga Resort – Cooperstown, NY
Huntingdon Valley Country Club – Philadelphia, PA
Boyd Homes – Virginia Beach, VA
The City of Providence – Providence, RI
SubAir Systems – Aiken, SC
Golf Life Navigators – Naples, FL
Bent Creek Country Club – Lancaster, PA
Camden Country Club – Camden, SC
FOM Golf Society – Bethesda, MD



Jeff Fleishman, President

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Golf Business Advisors has a clear mission:

To assist our clients with determining and meeting their objectives in the golf industry

The Golf Industry...Life after the Pandemic?

The golf industry has been slow to recover from the economic recession that began in the mid 2000s and many courses continue to close each year while only a few new ones are being built. The good news for the golf industry is that the supply and demand of courses is getting closer to equalizing and the golf participation numbers are looking more promising. Here are some interesting statistics on golf in the United States from the National Golf Foundation 2020 Reports:

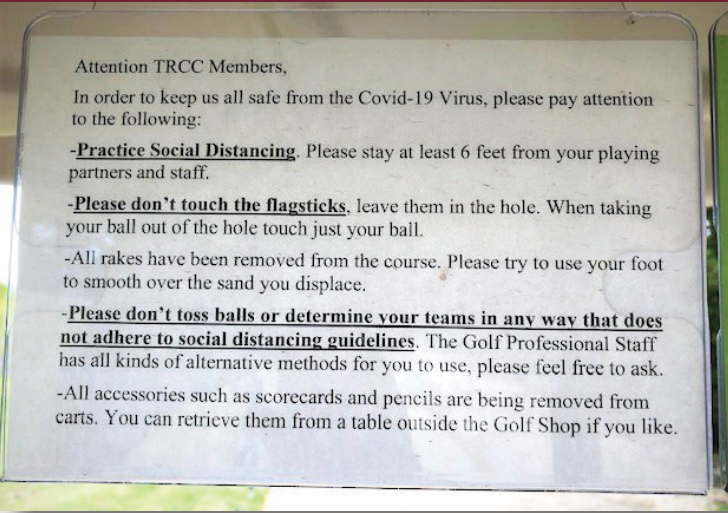
	2015	2016	2017	2018	2019
Total golf facilities	15,204	15,014	14,794	14,613	14,336
Total golf participation	24.1 million	23.8 million	23.8 million	24.2 million	24.3 million
Total Annual Rounds	466 million	469 million	456 million	441 million	441 million

The winter weather in 2020 was very good and many courses experienced a record number of rounds in the winter months—until mid-March, when the Coronavirus situation reared its ugly head and people began to get scared and courses and clubs (along with government entities) did not know whether or not the courses should be open. As of April 20, the NGF reports that approximately 50% of the courses in the United States are open, although 15 states are not allowing golf (primarily in the Northeast). The major professional golf tours have cancelled or postponed much of their schedules and even The Open Championship in the UK has been cancelled. The Virginia State Golf Association has cancelled and postponed many of their tournaments and each club is struggling with how to handle their schedule for the balance of 2020.

Many medical experts believe that golf is one of the safest activities you can participate in during the current outbreak as long as you take proper precautions. These include social distancing with the other golfers at the course and in your group, not sharing a golf cart unless it is with an immediate family member you live with, not

shaking hands after the round and not socializing in the clubhouse afterwards. The courses and clubs here in Virginia are open and fairly busy and have each developed a regiment of safety practices to limit contact with hard surface objects (like rakes, sand bottles, flagsticks etc.) and to promote social distancing (see sample from sign on carts at Two Rivers Country Club above). It seems to be working and is providing an escape and exercise (both physical and mental) to many golfers. The National Golf Foundation continues to keep track of the situation and their most recent report is found on this link: <https://thengfq.com/covid-19>

No one really knows how severe this Coronavirus situation will become and how long golf will be restricted, but it seems certain that golf tournaments as we knew them will change in the future and that we will have a “new normal” for our participation in group golf as well as for the PGA and LPGA Tour events. The restrictions on golf outings, weddings, other social events and regular dining are also hurting clubs financially. Hopefully, the food and beverage “take out” strategies will help them survive this difficult time. Many clubs and courses are also hoping to attract new members in 2020 and this situation may make that more of a challenge. However, I predict that there will be a great *itch* to return to golf when golfers can get back out and that the second half of 2020 may be a very busy time at all golf courses...I hope that I am correct!



Executive Search—Hiring The Right People Makes All the Difference



*Mike O’Neil, Director of Grounds
Tim Quirk, PGA Director of Golf
Geese dogs, (from left), Jack, Lola and Archie in front of the Otesaga Hotel*

helped them understand salary comparables in that New York area and posted the position in various places to attract candidates. After plenty of phone calls, resumes, interviews and background checks, the Committee selected Mike O’Neil, who has done an outstanding job getting the course into the best condition it has ever been in. Then, we were called back in the Spring of 2019 to assist them in conducting a Search for a top Director of Golf. Using similar techniques, we

We have enjoyed conducting Executive Searches for General Managers, Directors of Golf, Golf Course Superintendents and Membership Directors for private, daily fee and municipal clients for many years. Using our understanding of the golf and club business and the responsibilities of these key positions at successful clubs, plus our vast network of industry contacts, we have been very fortunate in attracting top candidates and assisting the owners, Board Members and/or Selection Committee in making the right decision for their situation.

We were contracted by The Otesaga Resort in Cooperstown, New York in 2018 to assist them in conducting a Search for a top Golf Course Superintendent for their historic Leatherstocking Golf Course. We developed a new Position Description,

attracted a large pool of candidates and the Committee selected Tim Quirk, who is doing an excellent job going into his second season at Leatherstocking. In both cases it was their experience and their engaging personality that matched the position at Leatherstocking plus their overall interest in making improvements that led to the Committee’s decision to hire them — and so far, it is working extremely well for all.

The Otesaga Resort and Leatherstocking Golf Course, designed by Devereux Emmet, are both overlooking Lake Otsego and were developed by and are still owned by the Clark family and opened in 1909. The Clark family also developed and still owns the National Baseball Hall of Fame and Museum, which is located a five minute walk away in downtown Cooperstown. Well worth a visit!

We have also completed successful Executive Searches for the following clients over the past few years:

- **James River Country Club** in Newport News, Virginia – General Manager
- **James River Country Club** in Newport News, Virginia – Director of Golf
- **Bent Creek Country Club** in Lancaster, Pennsylvania – General Manager
- **Nemacolin Resort** in Farmington, Pennsylvania – Director of Golf
- **Nemacolin Resort** in Farmington, Pennsylvania – Senior Golf Course Superintendent
- **The Country Club of Virginia** in Richmond, Virginia – Golf Course Superintendent
- **ValleyCrest Golf** in Calabasas, California – Golf Course Superintendent
- **Old Trail Golf Club** in Crozet, Virginia – PGA General Manager
- **Farmington Country Club** in Charlottesville, Virginia – Membership Director
- **Indian Creek Yacht and CC** in Irvington, Virginia – General Manager
- **Two Rivers Country Club** in Williamsburg, Virginia – Membership Director
- **Hershey Resort** in Hershey Pennsylvania – Director of Golf

Municipal Golf—Part of the Fabric of American Golf

Golf Business Advisors has long been a fan of municipal golf and has worked with many municipalities in a number of states to assist them in improving their operations, course conditions and financial situation. Municipal golfers are indeed a slice of Americana and enjoy the challenge of the courses, the fellowship and the exercise without all of the frills that the private and upscale daily fee courses offer. Perhaps it is a sense of accomplishment to help a municipality when their Council, Manager and Parks and Rec Directors often times do not understand the business of golf nor the value of their asset to their citizens. We have had two interesting municipal clients in the past year and outlined below is a brief overview.

The National Park Service is comprised of 419 different units (including parks, battlegrounds, rivers etc) throughout the United States and also three golf courses located in the District of Columbia—**East Potomac (designed by Walter Travis), Langston and Rock Creek (designed by William Flynn)**. The courses date back to 1917 and were a key part in the desegregation of public golf in America beginning in 1941. The three courses have historically averaged attracting over 110,000 rounds of golf per year and combined revenue of over \$6 million per year, although there is a great need for capital improvements to the courses and clubhouses. The courses had been leased to one company for many years and in 2019 the National Park Service chose to issue an RFP to lease the three courses beginning in September, 2020.

We were retained by the National Park Service to be a “subject matter expert” in assisting their Committee of Park Service employees in analyzing the proposals and answering questions. We visited the courses and analyzed the proposals in February, attended the Committee Meeting in early March and are now on call to answer questions and/or assist in lease details. Although no decision has been made on the

new lessee at this point, it is clear that the three courses will be completely renovated over the next few years and will soon offer dramatic improvements for the golfers of the Washington DC area.

Providence, Rhode Island owns the Triggs Memorial golf course, which was designed by Donald Ross and opened in 1932. It is one of the City’s 118 parks (including the famed Roger Williams Park that is over 435 acres) and overseen by the City of Providence Parks Department. The City self-managed the course for many years, but a local company has been leasing the course since 1990. The City of Providence put out an RFP for an evaluation of the Triggs course in early 1999 and we were awarded the contract with the purpose of providing them an overview of their asset and getting them prepared for an RFP for a possible new lessee in the next couple of years.

Our work included: Financial Analysis, Course Asset Analysis, Course Management and Maintenance Analysis, Marketing Analysis, Trends Analysis, Programming and Community Engagement, Overview of Management Options, Capital Improvement Recommendations and Estimated Costs and Draft of an RFP for leasing the course in the future. The course is very popular with local golfers due to the interesting Donald Ross design features and popular fee structure and historically attracts over 40,000 rounds per year.

One of the most interesting aspects of our study to me and the City officials was that the current lessee had made lease payments totaling over \$9 million and capital improvements of over \$2 million during the term of their lease. My satisfaction was in educating the Providence City officials all about their golf asset and helping them make plans for the next phase of renovations and management.

Well Executed Membership Sales and Marketing Plans and Innovative Programming Help Attract and Retain Members



***Beverly Van Straten,
Vice President***

We have continued to share our knowledge of Membership Sales and Marketing with many clients, as adding new Members is a key objective for financial success for most clubs.

We work to better understand the needs of both Club members and potential Club members, help Club’s understand their current demographics and identify target markets. Then, by developing and implementing comprehensive Membership Sales and Marketing Plans (in cooperation with the General Managers and the Membership Directors), we have helped our clients add over 1,500 Members valued at over \$6 million dollars in first year Initiation Fees and Dues in the past few years.

Most clubs have learned that a calendar of fun programming is now essential to help attract and retain new members. It now takes more than a great golf course and other club facilities, but it is the on-going club experience that has become more and more important. This should be planned for both adults and children and

should cover all of the sports and food and beverage. In addition to the standard Holiday type programming, a few of the “best in show” programming ideas that we have seen include:

- Beginner ladies golf instruction with champagne
- Outdoor yoga and exercise classes in great weather
- “Date Night” dinners for the parents with child care
- Special nights of Hamburger, Pasta, Pizza, Fish and Chips, Sushi
- “Wine and Nine” golf evenings
- Poker night, bridge, trivia, bingo and Mojang games
- Family Camp out on lawn
- Golf games where you just show up at designated times (in case you do not have a regular group)
- “Dive in movies” on weekly basis in the summer months
- Bocce and Pickleball leagues
- Mother-Daughter Tea
- Speakers series with interesting speakers
- Polar Swim Club for winter months (if pool is heated)
- Wine Shop in the Club with discounted wines
- Trips to ballgames, golf tournaments, historic sites, gardens etc.

The *Growth of the Game* Initiatives—Key Ingredient in Golf’s Future Success

Tiger Woods made one of the greatest comebacks of all time to win the 1999 Masters and an entire generation of younger golfers and non-golfers got a taste of “Tiger-mania”. The Augusta National Golf Club introduced the Augusta National Women’s Amateur the week prior to the 1999 Masters and hosted the best amateur female golfers in the world—which was a huge success and an amazing statement for women’s golf. 2020 was off to an exciting start in professional golf before the golf world was put on hold by the Coronavirus...will the excitement and growth of game around the world bounce back and continue to expand after this setback?

The game continues to expand around the world and there are now golf facilities in 85% of the countries in the world...golf was played in the Olympics in 2016 for the first time in over 100 years, fans have 24 hour access to the Golf Channel, PGA Tour radio and features and instruction on the web are also fueling the worldwide interest in the game—the PGA and LPGA Tours now conduct their regular schedules with tournaments in Australia, Korea, China, Japan, France, Scotland, England, Canada and Mexico.

My observations over the past 10+ years are that the kids today are so wrapped up in youth soccer, field hockey, lacrosse, baseball, basketball, volleyball, etc. that they are not playing the country club sports of golf and tennis like in prior years. Is it all in the quest for that college scholarship and is it the kids or the parents doing the pushing? With all of the little league, school and travel teams in all of these sports, golf is having a tough time finding its way.

However, the recent introductions of the following youth golf programs are all working to get young kids interested in golf—and I can see firsthand that it is working! **First Tee; PGA Junior Golf Leagues; Drive, Chip and Putt; LPGA/USGA Girls Golf; VSGA Junior Golf Circuit and many others in every state.** The kids are indeed flocking to these innovative programs that teach both golf skills and life lessons—and all have some focus on competition which is apparently what the kids are really looking for. Some of these programs are also finding their way into the school systems which is where I think they can make the most difference—by introducing all of the kids to the great game of golf. In addition, The **PGA of America’s and USGA’s** initiatives of ***Get Golf Ready, Play Golf America, Tee It Forward*** and ***Play 9*** are also introducing adults to golf and making it more fun for those that are playing.



The introduction of **Top Golf** facilities at over 70 locations in 31 states and five foreign countries are also invigorating and putting a new spin on the game. These facilities are sort of a combination of a driving range and entertainment offering instant feedback on shots to target greens and with a bar/grille in a festive environment.

To the golf industry, we commend you on the ***Growth of the Game*** initiatives—well played and keep it going!

The GBA Family



Jeff and Laura Fleishman with Winston and Chase Spong and Lily (left) and Deacon



Mike, Beverly and Jack Van Straten



Abbey and Tim Pemberton with Libby (left) and Merritt

Golf Business Advisors has been a family affair and we have enjoyed being part of each of our families lives over the 28 years.

Laura and I are thrilled that our daughter, Winston, married Chase Spong in the spring of 2019! We are very happy to have him join our family! They are both busy with their jobs, Winston is COO of KAA Federal Solutions and Chase is the Associate Director of Admissions at Woodberry Forest School. They live in Orange, VA with their dog Deacon.

Beverly Van Straten’s son, Jack, is graduating from high school this Spring and will be attending Longwood College on a partial cross country scholarship—congrats to Jack!

Tim Pemberton has been assisting both GBA and Commonwealth Golf Asset Management for the past few years when he is not chasing around those almost four-year old twins. Tim had not been playing much, if any competitive golf, but chose to try and qualify for the US Amateur last summer and was the medalist by 5 shots and got to compete in Pinehurst in his 3rd US Amateur.

Commonwealth Golf Asset Management



Golf Business Advisors has a long time friend now sharing office space. Mike Bennett recently formed **Commonwealth Golf Asset Management**, a full-service golf management company. Services include golf operations and golf course maintenance, food and beverage, staffing, accounting, human resources, sales and marketing and more—for complete information, visit the website at www.cgamgroup.com.

Commonwealth Golf Management now manages four courses: **Belmont Lake Golf Club**, Rocky Mount, North Carolina; **Penderbrook Golf Course** in Fairfax, Virginia; **CutAlong Golf Club** at Lake Anna, Virginia (opening summer, 2020) and

the **Stonehaven** and **Woodhaven** courses for the Glade Springs Property Owners Association in Daniels, West Virginia.

Mike has been a member of the PGA of America since 1994 and in 2011 achieved Master Professional Status in Ownership and Leasing. Mike has been the President of the National Golf Course Owner’s Association Middle Atlantic Chapter since 2008. Prior to forming Commonwealth Golf Asset Management, Mike served as the Vice President of Operations for Traditional Golf Management managing 21 courses.

Before joining Traditional Golf Management, Mike was the Managing Member of Westham Golf Partners, LLC which developed and operated Magnolia Green in Richmond, Virginia; was the General Manager of Williamsburg National Golf Club and the PGA Golf Professional at Keswick.